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T A S K F O R C E R E P O R T - A P P E N D I X A



TOURISM 1999 TASK FORCE

APPENDIX VOLUME A

Subcommittee Chair's Final Reports.....White

Funding
Welcome Centers
Group Travel
Consumer Information
Cooperative Advertising
Regions
Scenic Byways
Arts And Culture
Gaming
Historic Sites
Lodging
Signage
Trails
Outdoor Recreation

Community Meetings.....Blue

Iowa Tourism Industry Surveys.....White

Ranking of the Recommendations.....Blue



Submitted to the Iowa Tourism Task Force by the Iowa Tourism Task Force Sub-Committee on Funding

- Funding
- Wisconsin
- Group Travel
- Consumer Information
- Cooperative Advertising
- Regional
- Boatways
- Arts and Culture
- Golfing
- Historic Sites
- Lodging
- Restaurants
- Trails
- Outdoor Recreation

Submitted to the Iowa Tourism Task Force by the Iowa Tourism Task Force Sub-Committee on Marketing

Iowa Tourism 1999 Task Force

Funding Sub-Committee

The Iowa Tourism Task Force Sub-Committee on Funding was formed in 1997 to develop a plan for the future of Iowa tourism. The committee has held several public hearings and has received many suggestions from the public. The committee has also conducted a study of the current state of Iowa tourism and has developed a plan for the future of Iowa tourism.

The plan for the future of Iowa tourism is based on the following assumptions: 1. The Iowa tourism industry is growing. 2. The Iowa tourism industry is becoming more competitive. 3. The Iowa tourism industry is becoming more diverse. 4. The Iowa tourism industry is becoming more sustainable.

Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Advertising	100	110	120	130	140	150	160	170	180	190	200	210	220	230
Public Relations	50	55	60	65	70	75	80	85	90	95	100	105	110	115
Convention Services	200	210	220	230	240	250	260	270	280	290	300	310	320	330
Travel Services	150	160	170	180	190	200	210	220	230	240	250	260	270	280
Other	100	110	120	130	140	150	160	170	180	190	200	210	220	230

The following is a summary of the plan for the future of Iowa tourism. The plan is based on the following assumptions: 1. The Iowa tourism industry is growing. 2. The Iowa tourism industry is becoming more competitive. 3. The Iowa tourism industry is becoming more diverse. 4. The Iowa tourism industry is becoming more sustainable.

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Chairman
Michael S. Gould
Burlington Area Convention & Tourism Bureau
Burlington

Bonnie Baldwin
Steamboat Stop Country Store
Burlington

Tracey Kuehl
Children's Museum
Bettendorf

Peggy Slaughter
Group Five Hospitality
Iowa City

Background

The Funding Sub-Committee had a series of teleconference meetings to discuss methods to increase tourism funding through 1999 and beyond.

Many items were discussed including tax increases, redirecting revenues from riverboat gaming and converting some of Iowa's interstate highways to toll roads and directing some of those dollars to tourism advertising.

The principle goal of the sub-committee was to increase the state's advertising efforts without increasing taxes or interrupting dollars that flow into the state's general fund.

The plan the sub-committee is proposing today will accomplish both aspects of this goal while generating approximately one million additional dollars per year to assist in marketing Iowa as a tourist destination.

Funding Sub-Committee's Recommendation

The following is a conceptual plan for increasing travel related revenues and directing those revenues towards marketing Iowa for tourism. It is important to note that this plan does not involve a tax increase. Realizing that tourism is growth industry, the plan calls for taking dollars generated by the travel industry and reinvesting them to yield more revenue. The plan identifies four fundamental categories within the travel industry; Eating Establishments, Drinking Establishments, Hotels and Lodging and Amusement Parks and Services. Modeled after a similar program in Missouri, the sub-committee's recommendation is based on the assumption that tax revenue generated by the travel industry will grow by at least 3% per year. Based on information assembled over a four year period, this is a conservative estimate. When revenue increases are greater than 3%, it is recommended that a cap of 7% be placed on this fund. The sub-committee further recommends that 40% of the 3% - 7% growth in revenues, be directed to tourism advertising through the year 2000. In the year 2001, we feel this figure should be reduced to 30%. We request that these funds be placed in a revolving fund so excess dollars may be carried over from year to year if needed. These excess dollars should be expended before other revenues are used.

The Funding Sub-Committee also recommends of the revenues redirected from the travel industry for advertising, that 10% of these dollars go to cooperative advertising among Iowa's three tourism regions. To maintain a strong state tourism budget, we ask that the Iowa Legislature establish a "core" budget of \$3.3 million for the Iowa Division of Tourism operations and advertising. This figure represents the average allocation the Division has received from the Legislature over the past five years. The following chart projects Iowa's travel related tax revenues based on a 3% growth through the year 2005. Also included are the Iowa Division of Tourism's 90% marketing allocation and the Iowa Tourism Region's

Proposed Tourism Funding

Year	\$ Revenue	Growth Rate	% to Tourism	\$ Generated	\$ to IDED Mktg. 90%	\$ to Tourism Reg. Co-op Ad. 10%
1993	100,676,837	3%	40%	1,208,122	1,087,310	120,812
1994	103,697,142	3%	40%	1,244,366	1,119,929	124,437
1995	106,808,056	3%	40%	1,281,670	1,153,503	128,167
1996	110,012,298	3%	40%	1,320,148	1,188,133	132,015
1997	113,312,667	3%	40%	1,359,752	1,223,777	135,975
1998	116,712,047	3%	40%	1,400,545	1,260,491	140,055
1999	120,213,409	3%	40%	1,442,561	1,298,304	144,256
2000	123,819,811	3%	40%	1,485,838	1,337,254	148,584
2001	127,534,405	3%	30%	1,147,810	1,033,029	114,781
2002	131,360,437	3%	30%	1,182,244	1,064,020	118,224
2003	135,301,250	3%	30%	1,217,711	1,095,940	121,771
2004	139,360,287	3%	30%	1,254,243	1,128,819	125,424
2005	143,541,095	3%	30%	1,291,870	1,162,683	129,187

Travel Industry Revenues 1989-1992

Industry	1989	1990	1991	1992
Eating Estab.				
Tax Collected	<u>53,734,525</u>	<u>56,955,330</u>	<u>58,850,126</u>	<u>61,701,628</u>
(.03)	1,612,035	1,708,659	1,765,503	1,851,049
40%	644,814	683,464	706,202	740,420
Drinking Estab.				
Tax Collected	<u>9,756,348</u>	<u>10,087,263</u>	<u>10,744,984</u>	<u>11,445,018</u>
(.03)	292,690	302,618	322,350	343,351
40%	117,076	121,084	128,940	137,340
Hotel & Lodging				
Tax Collected	<u>10,776,612</u>	<u>11,407,866</u>	<u>11,961,406</u>	<u>13,575,069</u>
(.03)	323,298	342,236	358,842	407,252
40%	129,320	136,894	143,536	162,900
Amusement Parks & Services				
Tax Collected	<u>8,610,121</u>	<u>9,282,806</u>	<u>9,699,934</u>	<u>11,022,787</u>
(.03)	258,304	278,484	290,998	330,684
40%	103,322	111,340	116,400	132,274
Totals				
Tax Collected	<u>82,877,606</u>	<u>87,733,265</u>	<u>91,256,450</u>	<u>97,744,502</u>
(.03)	2,486,327	2,631,997	2,737,693	2,932,336
40%	994,532	1,052,746	1,095,078	1,172,934

Building Missouri's tourism industry can produce more tax revenue and new jobs — and do it faster than any other form of economic development. The problem is: How do we fund the promotion effort needed to keep tourism growing?

We propose to ask the Legislature and our new governor to take some of the money generated by tourism and reinvest it to yield even more revenue. We propose to increase the Division of Tourism's annual budget to \$20 million by the year 2001. And our plan will do this without a tax increase.

How? First, we will work with the Department of Revenue to identify tax revenue generated by specific, traveler-serving businesses. Only businesses in certain SIC (Standard Industry Classification) codes will be chosen. Then, since tourism is a growth industry, we will ask only for a percentage of the growth in this revenue each year, to be reinvested in more marketing for tourism.

Our plan is based on the (conservative) assumption that tax revenue generated by these specific industry categories will grow by at least 3.5 percent a year. We will seek to have 25 percent of the increase reinvested in the Division of Tourism's budget. The plan would begin in 1994 (Fiscal Year

1995), with the increase to be added to the Division's existing "core" budget of \$7.5 million.

Reinvesting 25 percent of the growth in tourism tax revenue each year would give the state a \$20 million tourism promotion budget by 2001. After that, the reinvested amount would drop to 10 percent of the increase each year.

What's in it for you? As the state's tourism budget grows, there will be more money to help build tourism in your area — more money for cooperative advertising, local hospitality training programs, a matching grants program, etc.

With more effective promotion, tourism will grow . . . and tax revenues will grow. As the years go by, the 75 percent of the tax growth that the Department of Revenue retains will be more than the 100 percent it's keeping now. It adds up: More money for promotion, plus more tourism growth, equals more revenue to fund other state programs (education, roads, health care, etc.)

We think this is a good plan. It simply takes a percentage of existing tax revenue that we can prove was generated by tourism and reinvests it in generating more tourism. It imposes no new tax burden on anyone. And it will produce more revenue for all state services and programs.

Travel Industry Businesses			
SIC #	Industry	91 Revenue (Thousands)	% of Total
<i>To be included in Calculations</i>			
5811	Eating Places, only	\$46,231	21.4%
5812	Eating and Drinking Places	\$99,878	46.2%
5813	Drinking places, Alcohol	\$7,957	3.7%
7010	Hotel, Motels and Tourist Courts	\$34,058	15.8%
7020	Rooming and Boarding Houses	\$56	0.0%
7030	Camps and Trailing Parks	\$508	0.2%
7033	Trailing Parks and Camp Sites	\$69	0.0%
7041	Organization Hotels and Lodging Houses	\$38	0.0%
7920	Producers, Orchestras, Entertainers	\$1,569	0.7%
7990	Misc. Amusement and Recreation	\$1,891	0.9%
7991	Boat and Canoe Rental	\$118	0.1%
7996	Amusement Parks	\$68	0.0%
7998	Tourist Attractions	\$4,815	2.2%
7999	Amusement NEC	\$1,394	0.6%
8420	Botanical and Zoological Gardens	\$7	0.0%
	Sub-Total	\$198,655	92.0%
<i>To be excluded from Calculations</i>			
7032	Sporting and Recreational Camps	\$95	0.0%
7510	Automotive Rentals, w/o drives	\$9,661	4.5%
7830	Motion Picture Theatres	\$3,790	1.8%
7940	Commercial Sports	\$2,755	1.3%
7992	Public Golf Courses and Swimming Pools	\$977	0.5%
8410	Museums and Art Galleries	\$52	0.0%
	Sub-Total	\$17,330	8.0%
	Total	\$215,985	100.0%

Source: Missouri Department of Revenue

9/28/92

TOURISM FUND!

YEAR	REVENUE (1)	GROWTH RATE	GROWTH IN \$ FROM '91
1991	198,655,000		
1992	205,608,000	3.5%	6,953,000
1993	212,804,000	3.5%	7,196,000
1994	220,252,000	3.5%	7,448,000
1995	227,961,000	3.5%	7,709,000
1996	235,940,000	3.5%	7,979,000
1997	244,198,000	3.5%	8,258,000
1998	252,745,000	3.5%	8,547,000
1999	261,591,000	3.5%	8,846,000
2000	270,746,000	3.5%	9,156,000
2001	280,222,000	3.5%	9,476,000
2002	290,030,000	3.5%	9,808,000
2003	300,181,000	3.5%	10,151,000
2004	310,688,000	3.5%	10,506,000
2005	321,562,000	3.5%	10,874,000

(1) Department of Revenue actual figures for 1991, thereafter

— A United Industry

“THE BILL”

Tourism 2001 Funding Legislation — HB 188

BE IT ENACTED BY THE GENERAL ASSEMBLY OF THE STATE OF MISSOURI, AS FOLLOWS:

Section 1. 1. The state treasurer shall monthly transfer an amount prescribed in subsection 2 of this section out of the state sales tax revenues which are deposited by the director of revenue in the general revenue fund pursuant to section 144.700, RSMo, in a fund hereby created in the state treasury, to be known as the “Division of Tourism Supplemental Revenue Fund”. The state treasurer shall administer the fund, and the moneys in such fund, except the appropriate percentage of any refund made of taxes collected under the provisions of chapter 144, RSMo, shall be used solely, upon appropriation, by the division of tourism of the department of economic development to carry out the duties and functions of the division as prescribed by law. Moneys transferred to the division of tourism supplemental revenue fund shall be in addition to a budget base in each fiscal year. For fiscal year 1994, such budget base shall be seven million five hundred thousand dollars, and in each succeeding fiscal year the budget base shall be the prior fiscal year’s budget base plus any additional appropriations made to the division of

of tourism, including any transfers made to the division of tourism supplemental revenue fund pursuant to this section. Notwithstanding the provisions of section 33.080, RSMo, to the contrary, moneys in the division of tourism supplemental revenue fund at the end of any biennium shall not be transferred to the credit of the general revenue fund.

2. In fiscal years 1995 to 2000, twenty-five percent of the increase in state sales taxes collected from the retail sale of tourist-oriented goods and services shall be transferred to the credit of the division of tourism supplemental revenue fund pursuant to subsection 1 of this section. In fiscal year 2001 and thereafter, ten percent of the increase in state sales taxes collected from the retail sale of tourist-oriented goods and services shall be transferred to the credit of the division of tourism supplemental revenue fund pursuant to subsection 1 of this section. The director of revenue shall annually compare the state sales taxes derived from the retail sale of tourist-oriented goods and services in the preceding calendar year and compute the appropriate amount which is to be transferred by the state treasurer to the credit of the division of tourism supplemental revenue fund. Where retail sales of tourist-oriented goods and services in any calendar year are less than the amount of such sales in the preceding calendar year, the director of revenue shall compute the appropriate amount which shall be transferred from the division of tourism supplemental revenue fund to the general revenue fund, and the state treasurer shall make such transfer only to the extent that funds are available in the division of tourism supplemental revenue fund.

3. As used in this section, sales of tourism-oriented goods and services include sales of the following:

- (1) Food at a restaurant or other similar establishment;
 - (2) Food and beverages at any eating and drinking establishment;
 - (3) Beverages at any drinking establishment;
 - (4) Room rentals at hotels, motels or tourist courts;
 - (5) Room rentals at rooming and boarding houses;
 - (6) Space and equipment rentals at campgrounds and nonresidential trailer parks;
 - (7) Rooms at organization hotels and lodging houses;
 - (8) Tickets for nonsporting entertainment events;
 - (9) Boat and canoe rentals;
 - (10) Tickets, goods and services at an amusement park or other tourist attraction; and
 - (11) Tickets, goods and services at a botanical and zoological garden.
- Section A. Section 1 of this act shall become effective July 1, 1994.

Section 144.700, RSMo

State statute requires director of revenue to deposit state sales tax revenue, except for certain funds earmarked for other purposes, in state general revenue fund.

Section 144, RSMo

State Sales Tax Law

Section 33.080 RSMo

Requires funds unexpended at end of state fiscal year shall be transferred to the credit of the state general revenue fund, with certain exceptions.

CALCULATIONS

% TO TOURISM	\$ TO TOURISM	TOURISM BUDGET	\$ TO GENERAL REVENUE
		7,500,000	
25%	1,738,000	9,238,000	218,723,000
25%	1,799,000	11,037,000	224,903,000
25%	1,862,000	12,899,000	231,299,000
25%	1,927,000	14,827,000	237,918,000
25%	1,995,000	16,821,000	244,770,000
25%	2,064,000	18,886,000	251,860,000
10%	855,000	19,740,000	260,482,000
10%	885,000	20,625,000	269,405,000
10%	916,000	21,541,000	278,640,000
10%	948,000	22,488,000	288,200,000
10%	981,000	23,469,000	298,093,000

w by 3.5% per year.

IOWA WELCOME CENTER SYSTEM

Situation Analysis

Iowa has one of the most unique Welcome Center systems in the nation and offers 18 locations. Seven of the centers are state owned, seasonally operated and located on interstates 80, 35, and 29. The remaining 11 received state funds to establish their centers which are locally owned and operated year round.

An additional center was funded in the FY93 appropriations bill. Funds for a center near Lamoni on south I-35 were allocated for a locally owned center. The center is scheduled to open in November 1993.

Funds for land purchase near Northwood on north I-35 were also provided in the FY93 appropriations bill. This area is included in the long range plan as a priority for a welcome center. The legislative language also allocated funds to the City of West Branch for a study for a welcome/historic center in their community.

Over 225,000 travel parties (average party size = 3) stopped at an Iowa Welcome Center between April and October 1992 which was a 3% increase over the previous year. Over 35% of those travelers indicated they had a destination in Iowa and the average time spent in the state was 3.1 days.

Showing the effectiveness of the Welcome Centers, 32% of the travel parties extended their stay in Iowa due to the information and assistance received at the center. More time in the state means more money spent by the travelers, who had an average daily spending of \$112. Total economic impact of the Welcome Centers exceeds \$191 million.

Issues Regarding the Iowa Welcome Center System

- * Funding contracts with the locally-owned Welcome Centers will expire in December 1994. At the termination of the original contracts, the State will need to execute new contracts with the centers. In order to maintain the current system, it will be necessary to provide some operational support to the locally-owned centers.
- * The physical condition of the Interstate Welcome Centers is extremely poor. Remodeling and/or reconstruction of the centers is warranted if Iowa is to present a welcoming environment to the traveling public.
- * The Interstate Welcome Centers operate from April through October with two staff people. The State of Iowa should expand the operations of these centers to year-round in order to fully serve the needs of the traveling public.
- * The State of Iowa has the potential to develop a "second level" of visitor information centers through a licensing program or a certification program. Such a program would provide a quality assurance system for the traveling public.

**Tourism Task Force 1999
Report of Objectives**

Group Travel Sub-Committee

Sub-Committee Members:
Jana DeBrower, Co-Chair
Fern Carlson, Co-Chair
Mark Eckman, State Liaison

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Following a series of meetings and sub-committee reviews, the following were determined by the Group Travel Sub-Committee as major objectives for the Iowa Division of Tourism Group Travel marketing plan for Tourism 1999:

- 1. Education** - Continue an alliance with the Iowa Group Travel Association as the key provider of group travel-related education for Iowa's tourism industry, while still offering group-related education sessions during the annual tourism conference.
- 2. Publications** - Update the Iowa Group Tour Manual within the next fiscal year.
- 3. Markets** - a) Focus domestic marketing efforts on prospective clients rather than current customers, complimenting, rather than duplicating the efforts of IGTA and other Iowa group travel suppliers. b) Focus international marketing on agriculture, aiming now for the Japanese and Canadian markets, with more emphasis over the next three to five years on Europe, South America and Australia.
- 4. Familiarization Tours** - Develop a continuous fam tour schedule so that at least one is offered per year.
- 5. Marketplaces** - a) Increase the number of marketplaces attended by the Iowa Division of Tourism and encourage further attendance by Iowa suppliers. b) Work in cooperation with IGTA to coordinate an Iowa group travel showcase, inviting tour planners to appointment sessions with Iowa suppliers.

**TOURISM 1999 TASK FORCE
CONSUMER INFORMATION COMMITTEE REPORT
SEPTEMBER 17, 1993**

Consumer Information Committee Members

Michele Walker (co-chair)
Western Iowa Tourism Region
502 Coolbaugh
Red Oak, IA 51566

Ross Harrison (co-chair)
Department of Natural Resources
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State Historical Building
Des Moines IA 50309

Kathie Swift
Iowa State Fair
Statehouse
Des Moines IA 50319

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1900 Third Ave.
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RECOMMENDATIONS

- * Publish a comprehensive listing of Iowa's public and private campgrounds.
- * Publish a comprehensive listing of Iowa's lodging facilities, including hotels, motels, inns, and bed and breakfasts.
- * Establish more conservative criteria for inclusion in the Visitors Guide.
- * Include the Iowa calendar of events in all packets mailed to in-state travelers.
- * Test-market a new publication presenting tourism attraction information in a different format, such as smaller travel regions or driving routes/loop tours.
- * Create a publications review committee made up of public information coordinators of appropriate state agencies (DED, DOT, DNR, DCA) which would meet regularly to share information on tourism-related publications.
- * Continue to give a high priority to historical attractions through our existing materials.
- * Recognizing that the electronic "high-tech" dissemination of tourism information is the wave of the future, follow the progress of other organizations already using these methods, and explore future possibilities for using electronic technology for tourism information.

Mission statement

Develop an efficient and effective consumer information plan for Iowa tourism that 1) coordinates the efforts of state agencies and regional tourism associations, 2) serves Iowa's tourism industry, and 3) addresses the needs of both in-state and out-of-state customers.

Objectives:

Develop a five-year plan for consumer travel information involving coordination between 1) state agencies and 2) regional organizations.

Include a transition plan for 1994 Tourism Division publications, assuming that the primary fulfillment piece (Visitors Guide) will not be radically changed for 1994.

Tasks

1. Identify the sources and distribution systems of various types of travel information on statewide and regional levels.
2. Identify overlapping areas and missing pieces.
3. Survey other industry groups, through the other subcommittees, to determine their needs and current situations
4. Discuss the issue of having different packets for in-state vs. out-of-state.
5. Discuss the issue of paid advertising and charging for consumer tourism materials.
6. Survey staff at Iowa's 18 Welcome Centers about tourism information requests and travelers' needs.
7. Survey other states' materials if necessary, as they pertain to specific issues.
8. Determine IDED publications mix for 1994.

R E S U L T S

Welcome Center Staff Survey
Consumer Information Committee
Tourism 1999 Task Force

1. What are the most-asked for publications at your Welcome Center?

Iowa maps: 16
Visitors Guide: 10
Specific area attractions/maps: 6
COE: 4
stickers/postcards: 3
bike trails: 2
Other states' maps: 2
mileage/distances: 1
city maps: 1
B&B: 1
major events: 1

2. What publications or materials do travelers ask for that you don't have?

camping: 8
miscellaneous specific activities or locations: 6
Other states' maps: 5
antiques: 4
State Capitol info: 3
souvenirs: 2
restaurants: 2
motels: 2
trails: 2
city maps: 2
county parks: 2
state symbols: 1
bumperstickers: 1
bags: 1
national highway map: 1

3. If the Division of Tourism and/or the Tourism Regions were to print additional materials, which three do you think would be the most important for your customers? Rank them with 1 being the most important.

Listing of public/private campgrounds: #1:20 #2:5 #3:2
Listing of hotel/motel facilities: #1:4 #2:3 #3:4
Listing of bed and breakfast inns: #2:1 #3:3
Map and/or listing of biking and hiking trails: #1:5 #2:4 #3:5
Map of scenic driving routes: #1:4 #2:4 #3:2
Listing of restaurants: #1:1 #2:2 #3:2
Other: antiquing: 2 comprehensive recreation guide: 1
 bumperstickers: 1
 history: 1

4. What do you think travelers like most about the Iowa Visitors Guide?

Photos/colorful: 12
Organization/regional breakdown: 9
It's free!: 2
State parks: 2
Regional listings: 2
Golf: 1
Descriptions: 1
bike trails: 1

5. What do you think travelers like least about the Iowa Visitors Guide?

No complaints: 9
Complete Calendar of Events not in VG: 4
Regions confusing -- how to find different cities: 3
Needs more history: 2
Needs state symbols: 2
How cities got their names: 2
Index: 1
locations of state parks unclear: 1
no lodging or camping: 1

6. Which section(s) of the Visitors Guide do you find most useful for helping travelers?

state parks: 12
All sections: 6
regional sections: 4
golf: 3
trails: 2
historical: 2
hunting/fishing: 1
water sports: 1 index: 1 arts: 1

7. What comments have you heard regarding the 1993 Vacation Value Directory publication? Do you feel that travelers find this type of publication useful?

Like it/like it very much: 19
much requested in past: 2
customers want more discounts: 2
needs some explanation when handed out: 2
customers especially want hotel/motel discounts: 2
too many "strings" attached to discounts: 1
too early to tell: 1

8. Our 1993 calendar of events is now a separate publication. Do you have any comments or suggestions on how to improve it? Have you heard any reactions from travelers?

good/OK: 8
want whole year in one: 4
want COE in Visitors Guide: 3
too early to tell: 2
Make towns easier to find: 1
too many different books to pick up: 1
same cover designs cause confusion: 1
needs more artwork inside: 1
ugly cover: 1

9. Do you think travelers prefer specific attraction or site brochures or regional\comprehensive brochures covering a whole area of the state?

both: 10
site: 10
regional: 2

10. Do you think travelers need other maps besides the state transportation map? What kinds?

other states: 11
bike trails: 4
county maps: 1
scenic drives: 2
city maps of larger cities: 1
maps of attractions just along interstate: 1
historic trails: 1
recreation map: 1

Other comments:

give a local contact phone number under each city listing
travelers ask for bookmarks, stickers, postcards
regions are confusing if you don't already know where the city is
covers don't look like "Iowa" this year -- don't like them

Tourism 1999 Survey
(Results pertaining to publications)

If the state could add three new brochures in 1994, which three should they be? Identify by #1 (first choice), #2 (second), #3 (third)

- * historical attractions
- * outdoor recreation
- * scenic byways

Tourism Task Force 1999
REGIONS sub-committee

Committee

The Regions subcommittee is made up of 12 tourism professionals, representing all three regions and three county clusters, or sub-regions.

Regions Situation Analysis

Each of the three tourism regions in Iowa exist today with very similar missions: **to enhance the visitor industry in the regions through marketing and education.** The perception by many is that the regions serve to connect counties, businesses, and smaller organizations to the state.

In all three regions, marketing has played a major part in the programs of work. And, as indicated by the Region marketing efforts, provide opportunities for organizations and businesses to be part of a larger marketing program - something they may not otherwise be able to afford. Members are able to utilize region advertising to the degree their budgets allow.

A Developing Trend: County Clusters

- Northeast Iowa Tourism and Recreation
- CAHAPOSHAU
- Southern Exposure (formerly Southern Iowa Nine)
(crosses Western and Central region divisions)
- Top of Iowa
- Tri-State Tourism
(crosses state borders)
- Great Rivers Region
- Loess Hills Hospitality Association

There are differing opinions as to the effectiveness and value of the county clusters. Most serve to market smaller groups of counties in "smaller bites" for the traveller. Most of the REGION sub-committee members believe that county clusters are here to stay and should be an integral part in tourism promotion with some kind of connection to the regional efforts.

Differing opinions illustrate that some county cluster members enjoy a closer link to their regions because of involvement in their cluster, while others see cluster organizations functioning completely independently of their region. Reasons against cluster organizations include their ability to have the potential to dilute the strength of the region by forcing choices among already busy members: Attend a cluster meeting or attend a region meeting? Do cluster committee work or do region committee work?, etc. Reasons for county clusters include shorter geographical distances to attend meetings, and more localized marketing efforts.

Task Force Sub-committee Recommendations for the REGIONS

- I. Improve communication
 - A. Between Regions and the Division of Tourism

As long as funding continues to come from the state, clear communication is essential.

 1. Continue 1993 style of greater communication with industry
 - a. task force
 - b. community meetings
 - c. mini-conferences
 2. Implement Focus Groups once a year to examine and mesh together:
 - a. region needs
 - b. state needs, then, (see II.C.)
 - B. Between Counties and their Regions
 1. Implement reporting procedure
- II. Strike a Balance between funding and state contracted activities

As long as funding continues from the state, a balance between state-contracted activities and the desires of region members must be struck.

 - A. Allow each region flexibility within contracted activities, so that programs may be tailored to specific region needs
 - B. Eventually reduce the state funding to the regions to enable more direction by membership
 - C. Determine state needs and fund those accordingly
- III. Marketing and Public Relations
 - A. Enhance state's marketing plan, eliminate duplication of efforts
 1. Be apprised of the Long-range plan for the Division of Tourism
 - B. Act as P.R. clearinghouse for region
 1. about region (private sector is least informed about regions)
 2. for region members
- IV. Technical Assistance, Education and Networking
 - A. Directors would coordinate within region, resources to tap for:
 1. brochure development, design, writing, printing, etc.
 2. budgeting assistance
 3. etc.
 - B. Directors would coordinate educational opportunities with state and other organizations

TOURISM 1999 TASK FORCE

SCENIC BYWAYS SUBCOMMITTEE REPORT

AUGUST 1993

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Council Bluffs

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Scenic Byways

Great River Road

Scenic byways have been specially recognized and signed for many years. The Great River Road is one of the first and one of the most unique scenic byways in the United States. First suggested in 1936, the goal was to develop a highway corridor along the Mississippi River to preserve the special quality of its valley. A commission to develop the road was organized in 1938, but it was not until August 1949 that Congress authorized a study and survey to be done by the National Park Service and the Bureau of Public Roads. Their report to Congress in November 1951 recommended using many existing highways rather than constructing a new federal route. Federal funds were appropriated in 1954 for planning the Great River Road as a parkway using land on both sides of the Mississippi River, connected by its many bridges. In the '70s and '80s, Congress allocated about \$250 million to the states for the Great River Road.

Extending nearly 3,000 miles from the Gulf of Mexico to the Mississippi's headwaters at Lake Itaska in Minnesota, the Great River Road continues in a circular route northward around Lake of the Woods through Minnesota, Manitoba, and Ontario. Most of the Great River Road states, including Iowa, have signed the route and indicate its route on their state map. The signs show a green stylized riverboat pilot's wheel with 12 spokes representing the 10 states and two Canadian provinces where the road is located. Maps use a similar wheel design to mark the Great River Road.

National Scenic Byways Program

In recent years motorists have shown a renewed interest in scenic byways. In 1990 a study by the U.S. Department of Transportation (DOT) gave the following rationale for a National Scenic Byway Program:

A national, non-Federally directed scenic byway program to recognize and promote the Nation's outstanding scenic byways makes sense for several good reasons. Among them are such a program's potential effectiveness in

- Assuring that more Americans come to know and to appreciate

the Nation's superb scenic, cultural, and historic resources.

- Inducing new economic development in communities and regions by creating new jobs, stable industries, and expanded tax bases.
- Protecting and enhancing the scenic, cultural, and historic assets within scenic byway corridors.
- Reducing traffic congestion on some major travel routes by encouraging more tourist traffic to divert to parallel and less heavily used routes.
- Encouraging foreign travelers to visit the United States more often, to stay longer, and to travel more widely while here.

(National Scenic Byways Study, 1991, p. 5)

The latest Congressional action, the Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA), establishes a National Scenic Byways Program and a Scenic Byways Advisory Committee. The ISTEA also offers grants to the states under an Interim Scenic Byways program while the national program is being developed. The interim program's grants may be awarded to any state with designated scenic byways and will be in effect for federal fiscal years (FFY) 1992-94. Allocations may total up to \$10 million nationwide annually, depending on funding availability. The Iowa Department of Transportation (DOT) has applied for over \$300,000 in funding for FFY 1993, which ends September 30, 1993.

The ISTEA requires that projects receiving grants protect the scenic, historic, cultural, natural, and archeological integrity of the highway and adjacent area.

Status of Scenic Byways in Iowa

At the state level, the Iowa General Assembly enacted legislation in 1987 which outlines objectives for a scenic routes program. In 1990 an appropriation of \$500,000 to the Iowa DOT implemented a scenic highway pilot project. Part of this appropriation was used for a research survey and scenic

evaluation of nominated routes. The Iowa Department of Economic Development (DED), Tourism Division, will use part of the funds for the promotion and evaluation of four selected pilot routes. While the state pilot project emphasizes tourism to comply with the legislative directive, the national scenic byways program emphasizes the preservation of scenic, historic, cultural, natural and archeological qualities of the roadway.

In the summer of 1990, the Iowa DOT joined Kansas, Nebraska and Missouri in a four-state study on how to evaluate the scenic quality of highways. Selected routes in each state were tested on these seven criteria: (1) what one sees, (2) quality of view, (3) how long one sees a view, (4) quality of presentation, (5) type of activity along the route (i.e., historic sites, parks, refuges, museums, etc.), (6) visual character of the road, and (7) monotony versus variety. Candidate routes for the pilot scenic byways project were selected using this objective tool to evaluate a roadway's scenic quality.

In January 1992 state, county and city officials in Iowa were invited to nominate candidate routes for the scenic byways pilot project. More than 40 nominations were received and 22 routes were surveyed in the summer of 1992 using the criteria tested in 1990. Four routes were selected for the scenic byways project and will be officially designated once agreements are signed with city and county officials. After signs are erected, these routes will be monitored and evaluated until fall 1994 for their ability to attract tourists.

In addition to the state's efforts, several communities have come together to offer motorists alternatives to commonly used routes. Some of the routes that combine scenic drives with historic sites and other attractions are listed below.

The Dragoon Trail in central Iowa follows the historic route of U.S. Dragoon soldiers in the early 1800s. The trail starts with one fork in Ft. Dodge and one in Webster City; they join near Stratford. The trail then continues southeast through the Des Moines River greenbelt to the southern end of Red Rock Reservoir. The greenbelt area includes nine counties: Webster,

Hamilton, Boone, Dallas, Polk, Jasper, Warren, Marion, and Mahaska. Dragoon Trail signs, as pictured on the brochure, are posted along the route. Although the Dragoon Trail is primarily a scenic/historic route, many recreational opportunities are mentioned and pictured in the brochure.

Another multi-county effort is the Loess Hills Scenic Byway in western Iowa, starting in the north by the Big Sioux River at Akron and running south (generally parallel to I-29) to the Missouri border near Hamburg. Seven counties are part of this byway: Plymouth, Woodbury, Monona, Harrison, Pottawattamie, Mills, and Fremont. The Loess Hills Scenic Byway is a path of connected highways and county roads through the geologic wonder of the Loess Hills, which were formed from deposits of wind-carried quartz silt between 18,000 and 150,000 years ago. Even though the focus is on nature and scenic beauty, the brochure also marks cultural, historic, and recreational points of interest.

In contrast to the multi-county efforts, Van Buren County residents have come together to promote the historic villages and scenery primarily along county road J-40. Most of the small communities in this southeastern Iowa county are located along the Des Moines River and were first settled in the 1830s, when travel by water was prevalent. In recent years a group called the "Villages of Van Buren" has produced a visitor guide and has promoted events such as "Bike Van Buren," an August two-day bicycling tour of approximately 95 miles of county roads, and "Van Buren Scenic Drive," an October tour of the county which includes the Forest Crafts Festival at Lacey-Keosauqua State Park. Before the 1993 summer floods, the county was planning to put up scenic route road signs and was making a new four-color brochure of the area's attractions.

Allamakee County has outlined five tours in its brochure, "Auto & Bicycle Touring Routes." The brochure provides a map of the county including selected scenic roads and information on points of interest with black and white pictures of some of the architecture. Allamakee County is located in the northeast corner of Iowa bordered by the Minnesota state line and the Mississippi River. The area contains Effigy Mounds National Monument, many historic buildings and sites, and wooded hilly scenery.

Scenic Byways in Other States

According to the U.S. Department of Transportation, most states have a scenic byways program. Alaska and Hawaii feel that all their roads are scenic and see no need for special designations. Some other states do not see any advantages and are concerned about the possible safety hazards of "rerouting" traffic over narrow, poorly aligned roads. Several states are still weighing the pros and cons of a scenic byways program.

Informing the general public about scenic byways is accomplished by the states in a variety of ways. Of the six states bordering Iowa (Minnesota, Wisconsin, Illinois, Missouri, Nebraska, and South Dakota), only Nebraska designates general scenic routes on its transportation map. Other kinds of special routes are shown on maps for these states:

- Wisconsin and Michigan have Great Lakes Circle Tours marked. (Although not mentioned on the transportation map, Wisconsin's "rustic roads" are listed in detail in a separate booklet.)
- Historic trails are listed and marked by Illinois (Lincoln Heritage Trail), Missouri (Lewis and Clark Trail), and Nebraska (numerous trails, including the Oregon Trail).
- Illinois and Wisconsin mark what they call state trails on their maps.
- Minnesota marks state bicycle trails; Illinois marks the U.S. Bicycle Route 76.

Just as varied as the type of information provided is the form in which it appears on the map. Routes are often designated by small dots along the highway line or by highlighting on the line. Trails are more likely to be separate entities, often going cross-country, and shown by dots, dashes, and combinations of dashes with x and o shapes. While highlighting generally shows up best, much depends on other surrounding map features. (Scenic routes may be difficult to find among the other information on the map.)

Some states include, on the front side of their map, a picture of the road signs designating scenic/historic routes.

- Michigan places a description of the Great Lakes Circle Tours on the upper left side of the map along with a depiction of the four signs--one

for each lake--which mark the roads.

- Arizona uses the same sign for its parkway (P), historic (H), and scenic (S) roads as depicted in the legend and again just below the southern border of Arizona on the map. The type of road is distinguished on the map by a yellow highlighted hexagon at each end containing the letter P, H, or S.
- Maryland gives the address and telephone number of the agency which distributes the Scenic Routes map and other maps. This information is boxed off at the bottom of the Maryland map under the heading "Other Available Maps." Directly to the right is another box, "Maryland Scenic Routes," which includes a picture of the black-eyed susan as used on the scenic route signs.

Other states have depictions of scenic routes/historic trails and points of interest separate from the main map, usually on the back of the map.

- Nevada sets apart five major highways for more detailed route information, including topography and historic/scenic points of interest. Next to each one is a small graphic of Nevada showing the location of that highway in the state.
- New Mexico has what it calls "loop tours," which include parts of historic trails and scenic areas as well as suggested attractions in the cities. Maps and pictures illustrate each tour.
- Kansas provides a single depiction of the six historic trails running through the state, below which are photos and short descriptions of the sites along each one.

A variation of these scenic/historic tour maps is the description of sites and events by region. New York has ten suggested tours described on the back side of its tourism map, which has scenic roads/trails marked along with the other roads and highways on the front side main map. The ten tours combine scenic parkways, historic sites, recreational activities, and cultural events into a tourism package by region. A centrally located map shows the routes of all ten tours.

Indiana is unique in not only putting scenic byways on the map but also

listing each one and its location (below the map to the left of the legend).

Oregon simply mentions its designated scenic highways and where to find information on them in a box at the base of the index to cities and towns.

From these examples, it is clear that options abound for providing information and designating scenic byways. The three basic ways are to include the routes on the main transportation map, on another part of the publication, or in a separate publication.

AAA Scenic Byways

The American Automobile Association (AAA) provides its members with maps which include scenic routes designated by AAA for many years. AAA has developed a system of data collection for its "Road Reporters" to use when driving/evaluating possible scenic highways.

AAA criteria for selecting scenic highways originally had four categories:

- Quintessential represented the best of the characteristic features or scenery of a state or region.
- Natural Beauty sought to define the most strikingly beautiful scenery for natural features such as mountains, rivers, canyons, forests, etc.
- Cultural Beauty represented a particularly pristine or well preserved scenic route through essentially man-altered terrain featuring economic, historic or architectural activity.
- Unique categorized a limited area that is unique to the region such as geothermal features, redwood or rain forests, atypical desert terrain, etc.

(Final Case Study for the National Scenic Byways Study: The History of AAA's Scenic Byways Program, 1990, p. 1)

A fifth category, Public Lands Scenic Byways, was added in 1988 when AAA became involved in the national Scenic Byways initiative. Roads designated by government agencies as scenic may be included in AAA publications if they meet AAA standards.

Road Reporters collect data on scenic routes, check out the scenery, and rate the surface, shoulder, alignment, and grade of the highway. They report the data collected on the road and include pictures and recommendations for or against having that particular route on the AAA map as a scenic byway. Routes which are selected (or retained) as scenic byways are indicated on AAA maps by black dots along the highway marking.

Task Force Recommendations

The Scenic Byways Subcommittee of the Tourism 1999 Task Force believes scenic byways are a valuable resource for the State of Iowa. Although the tourism aspect of scenic byways is encouraged, it is important that Iowa protect and preserve them as natural scenic resources for future generations. Therefore, the subcommittee supports the development of a DOT scenic byways program which emphasizes preservation of scenic, historic, cultural, natural, and archeological qualities of the roadway.

The Tourism 1999 survey of private tourist attractions and chambers of commerce/convention and visitor bureaus identifies scenic byways as one of the top three subjects for brochures if new ones are produced in 1994.

Keeping this information in mind, the subcommittee recommends that:

- Information on scenic byways be developed and published--either separately or in combination with information on recreational trails, parks, water recreation, and other outdoor activities--and be distributed through the DED and welcome centers.
- The DED include scenic routes signed by local governments, as well as the state designated routes, in its tourist publications.
- Entry into the scenic byways program be by local initiative with the DOT as a technical and educational resource for the communities involved.
- Traveler services to support tourism be provided in such a way that scenic integrity is maintained.
- The Iowa General Assembly appropriate funds to the DOT for a statewide scenic byways plan (similar to the trails plan) and ongoing program.

REPORT FROM THE ARTS AND CULTURE COMMITTEE OF THE TOURISM TASK FORCE

The Arts and Culture Committee of the Tourism 1999 Task Force met on Tuesday, May 18, 1993 from 1 - 3 p.m. at the Iowa State Historical Building in Des Moines.

Present: Tamara Kuhn, chair, from the Iowa Arts Council; Rick Knupfer and Mary Helen Stephaniak with Iowa Humanities Board; Deb Stanton from Clear Lake former President of Iowa Association of Local Arts Agencies, Nancy A. Pitt from Countryside Travel, Angie Cool from the Centerville Chamber of Commerce, and Jane Echternach from Missouri Valley.

Other members of the committee: Mike Murwin from Tourism, Naomi Stovaal from the Iowa Library Association, Mickey Willroth President of the Iowa Assembly of Local Arts Agencies, Joan Hern from the Land of Festivals, and Kay A. Swan from the Iowa Sesquicentennial Commission, and Lore Solo from the Iowa State Historical Society.

For the purposes of this report, the word culture refers to arts, humanities, and historical organizations, as well as science centers, the botanical center, etc.

Attachments to this report include: Arts and Culture Meeting Agenda, Meeting Notes indicating the process followed in analyzing Arts and Culture in Iowa as it relates to Tourism, and a list of Committee Member addresses.

Current Situation Analysis:

The Arts and Culture committee analyzed the current situation of arts and culture as it relates to tourism in Iowa. There is currently no arts and culture goal in the overall plan for tourism although there is evidence that these groups are working together in some ways such as incorporating Iowa artists into festivals and local artists participating in craft fairs and as entertainers. Many of these activities are superfluous and happen by accident rather than by an organized coalition of arts, humanities and cultural organizations uniting for a common purpose. Tourism activities are more commercial in nature, generating large dollars from local merchants through activities such as Pancake Days, Reunions, and Homecomings. In addition, tourism often generates events using themes such as "Coal Miner's Hometown" which carry much potential for tie-ins with the humanities, arts, and cultural activities. The arts, humanities and history are interested in content, in creating an experience for the traveler which touches the spirit and draws them back for more. The committee felt there were strong advantages in uniting these groups but that more education of the people involved in both tourism and cultural organizations was needed for mutual understanding to help each group achieve their purpose in the venture.

Recommendations based on analysis of strengths:

(The following recommendations have been synthesized from the brainstorming session conducted at the committee meeting. Other specific suggestions have been included in a list at the end of this report.)

1. **Identify cultural organizations as tourism organizations and vice versa.** There is currently a movement in Iowa spearheaded by the Iowa Humanities Board to form local consortiums of cultural organizations (Community Cultural Service Providers). The committee recommended that tourism organizations be included in these coalitions and that cultural organizations be included in tourism coalitions. Audiences: Humanities organizations/Arts Councils/Historical Societies/Libraries/CVBS/C of C/Councils of Governments/Community Cultural Service Providers through the Institute of Decision Making (UNI), Travel Agents.
2. **More education and training in cultural tourism.** Tourism organizations need to know how to find, approach and work with cultural organizations to promote local cultural treasures without cheapening or over commercializing the cultural experience. This could be done through training at the tourism conference, and tourism training at humanities, history and arts conferences. Perhaps these events could even be joined -- for example: humanities providing speakers, artists exhibiting at booths and conducting performance showcases and informances, right along with tourism workshops on marketing and organizational development (which cultural organizations need). This would have to be carefully orchestrated to meet the needs of all groups and is offered here as an example of cooperative education efforts.
3. **Integrate high quality cultural experiences into tourism events and attractions.** For example, the committee discussed at some length the benefit of the Iowa Writer's Workshop with its international reputation for bringing quality writers into the state. Some (in fact, many) of the greatest writer's in the world spend time in Iowa as a result of the International Writer's Workshop. These writer's would enjoy traveling and conducting readings in small Iowa communities. These kinds of activities could then generate international attention for the state and the community. This is the kind of experience one can ONLY have in Iowa because of this unique opportunity -- this is one of the benefits of integrating cultural experiences into tourism. Many of these opportunities are simply not imagined yet by people in tourism because these groups are not integrated and are not learning from each other. The committee suggested that perhaps these groups could get together over a series of Coffee Talks in local communities.
4. **Recognize the tourism industry is the intersection of culture with marketing.** Even the largest cultural organizations do not have the money needed for professional marketing programs, especially state and national advertising. However, tourism organizations are skilled in marketing as it is their livelihood. Dollars for marketing Iowa culture and cultural organizations need to be seen as a tourism investment, not an expense. Cultural organizations need to be joined together in a marketing effort for

greater impact than they are now achieving alone. There is a need for money to produce a cultural directory, for example, so tourism entities and cultural organizations can connect because they know where to find each other. On the other hand, cultural organizations excel at creating and producing programs, events, experiences, and attractions of high quality. Tourism organizations can, in turn, benefit from this expertise.

5. **Encourage creative thinking about tourism.** For instance, emphasize the educational aspect of cultural tourism -- classes by artists, Mormon Trail, Croatian Fest, Grant Wood Festival, Bix Biederbeke and more! Food and Humanities might be a new idea for tourism -- wine festivals, etc. Communities need to give people a reason to travel there -- make the cultural experience enticing.

IN SUMMARY

Culture (arts, history, etc.) is the experience, humanities explains why it is important, and tourism makes it enticing. Together these three groups can work together and create participatory tourism which makes a meaningful experience for the traveler.

BRAINSTORMING

Because some enlightening ideas occurred during our meeting I've included them here as a "mind candy" to perhaps stimulate interest and spin off ideas for the plan.

- * People are looking for traditions. Sell "Get away from it all," back to basics.
- * People travel to experience other people
- * Cultural traditions may be right next door. Every town has some version.
- * Every community has a different flavor, something unique to promote that is found only in that community.
- * Diversity through culture. Explore the diversity of Iowa through its culture.
- * Cultural tourism is about keeping dollars from leaving the state, not just getting dollars into the state.
- * 68% of Iowans take in-state vacations in 1993 as a result of the economy and that is down from last year.
- * Haverhill is an example of a small community that used culture to create a unique national Blacksmith festival which drew tourists from all over the world.

- * Indian history can be a big draw for a community.
- * Dvorak -- Spillville. Music festivals may be created anywhere.
- * Prusse School of Music -- Susuki method -- an opportunity for a tourism event.
- * Choir festivals, band festivals.
- * "Culture Center" in communities -- inclusive not exclusive.
- * Promote the community theater loop in SW Iowa.
- * Farm Home Tours -- common draw, for example, Ostrich tours, Llamas -- but perhaps cows and bulls can be too when put into a cultural context.
- * Shopping is a draw.
- * Architectural Walking tours.
- * Quilts
- * Images of Iowa in people's minds? bad smells, truck stops, endless fields of corn -- can be transformed by books like Sense of Place and Take This Exit.
- * Book festivals -- book fairs. Where do people get books in a small town?
- * Touring Arts Team, Chataqua.
- * "Teach and delight" oral histories from own communities
- * Small town --local guides for tours -- these are often local storytellers and characters.
- * Bus tours -- local storytellers go on bus tours (kind of like actors -- the bus is the stage and the group becomes connected to the community through the tour -- they almost become part of the play, so to speak) Progressive Theater bus tours -- another venue for community theatre and/or professional theatre.
- * Oral history project "Reader's Theatre"
- * Living history "Reader's Theatre" -- telling stories of local history/arts
- * Using local characters for example, Janet Dailey -- romance novelist from early, Iowa or Simon Estes from Centerville. Iowa communities need to research and develop this kind of information (or use cultural resources to do it for them).

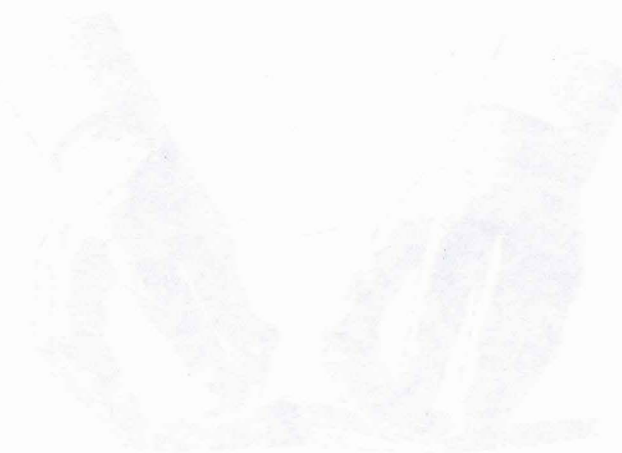
* Artists-in -residence, Retreats, Colonies.

* Arts and Humanities lectures and exhibits

* Promote the things we do like no one else.

TOURISM 1999 GAMING TASK FORCE

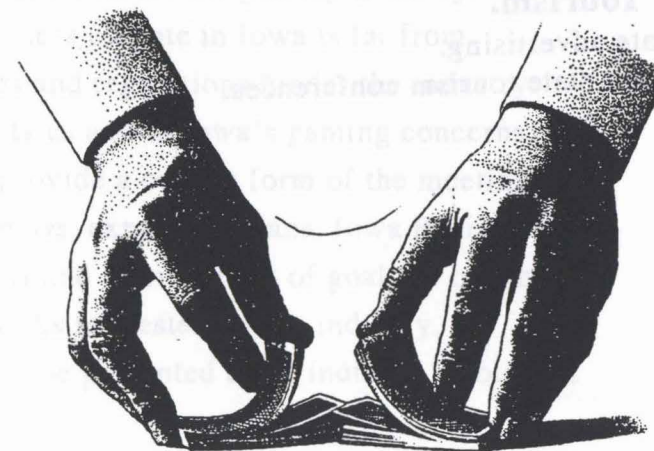
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CHAFFIN

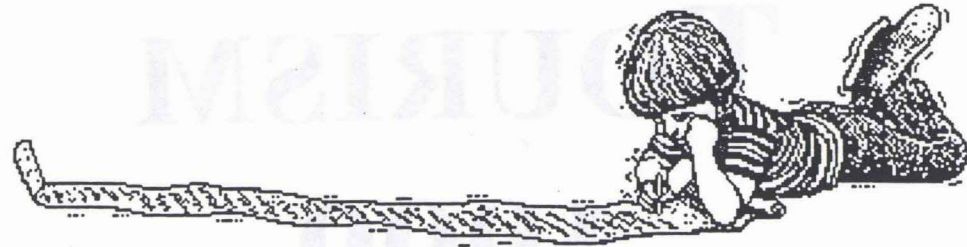
TOURISM 1999 GAMING TASK FORCE

A GOOD DEAL FOR IOWA



**RICH MILLS
CHAIRMAN**

PRIORITY LISTING



I. Legislative.

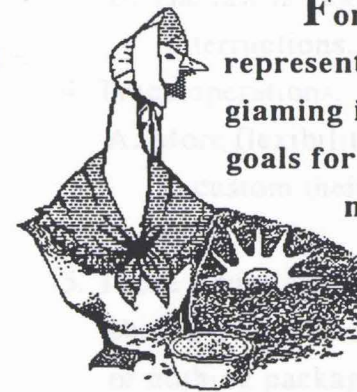
1. Raise the limits.
 - A. Change the \$5.00 table limit.
 - B. Change the existing per cruise limit.
2. Riverboats.
 - A. Amend the current space restrictions limiting the vessel to gaming.
 - B. Amend boarding times during dockside operations.
3. Race track.
 - A. Amend the racing schedules to give more control to the track.
4. If there is not a leveling of the playing field with our competitors, we must have tax relief or there will be gaming businesses going under.

II. State Division of Tourism.

1. More out-of-state advertising.
2. Continue mini and state tourism conferences.

TOURISM 1999

“GAMING TASK FORCE COMMITTEE REPORT”



For the first time in Iowa history representatives from every segment of the gaming industry meet to discuss positive goals for the gaming industry and to assist needs.

The non-profits licence holders, dog and horse tracks, riverboats and land based Indian Nations casinos were there.

It is important to note that the gaming industry is very competitive not only with other Iowa based gaming businesses, but also with increasing competition from outside the State. Times are difficult for the gaming industry. The gaming industry business climate in Iowa is far from friendly. Heavy taxes and regulations hinder the industry compared to other states add to Iowa's gaming concerns.

This report will provide a outline form of the meeting, economic impact reports, expansion plans, Iowa Racing and Gaming's latest report and a priority list of goals as outlined by the total industry. As requested by the industry, the economic figures will be presented as an industry whole and not broken down.

LEGISLATIVE



I. Limits.

1. Agreed to by all.
 - A. Allows Iowa gaming to be more profitable and competitive with other states.
 - B. Will generate more tax revenue for the State.
2. Very important the eastern side of the State because of Illinois unlimited stakes.
3. The customer requests it.
 - A. Customers are insulted that the State treats them like little children and unable to decide how much to loss or wager.
4. It confuses motorcoach and groups leaders and causes a lot of public relations problems.
5. Static's show that the house has an advantage with limited stakes. There is no way to place a bet and get ahead.

II. Regulations.

1. D.C.I.
 - A. The charges and numbers of agents are not competitive with other states.
 - B. At first the State viewed the gaming industry as a risk, so they assigned top agents. Now they have seen that the risk is not there they have assigned new agents fresh out of the academy. The problems here is they are over zealous in there duties. Also they have different interpretation of the rules. This leads to several problems both to the customer and to the owners.

- C. The DCI should include hospitality training in there normal curriculum,
2. Age limits.
 - A. A considerable amount of money has been spent advertising this. It would be confusing and would impact the industry negatively to change now.
3. Dockside operations.
 - A. Must be relaxed.
 - B. The law is vague and open to allot of different interruptions.
4. Track operations.
 - A. More flexibility should be awarded the tracks to custom their season fortheir markets and budgets.
5. These issues are very political but each issue should be debated separately and not tied into an all or nothing package.
6. Slots in the tracks.
 - A. Too hot of an issue.
 - B. Lots of behind closed doors meetings to address now.

III. Taxation.

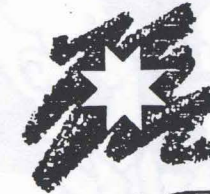
1. Iowa is out of line with other states.
 - A. Mississippi. 5%.
 - B. Illinois. ?
 - C. LA. ?
 - D. Nevada. ?
2. If Iowa is going to continuos to regulate and interfere with this industry, they must provide some tax relief, or be ready for business closings.
3. Ear marking the revenues.
 - A. The group is concerned with the political realities of being to forceful about dictation where the tax revenues go.

B. Personal Note: It is time that the tourism industry stand up for itself and say that moneys generated by the tourism industry go back into the tourism industry to market itself. There was no opposition to this concept.

IV. Communications.

1. Feel that there is good communication with their legislatures.

STATE DIVISION OF TOURISM SUPPORT



The Time is Right
DISCOVER IOWA TREASURES

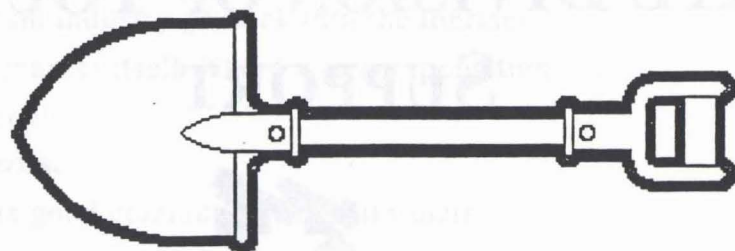
I. Over view.

1. Since so many of the developers are from out of state many do not know what is available. The State and state wide associations should recognize that their is allot of turn over in this industry and design programs with that in mind.
2. Several suggestions the industry outlined as projects an programs are being supplied by either the State of state wide associations such as the Iowa Group Travel Association, Regions, Iowa Conventions and Visitors Bureaus, and the Travel Federation of Iowa.

II. Needs.

1. Motorcoach packaging.
2. Out of state marketing.
 - A. This is a question that the State is asking themselves. The Gaming Industry feels that they will handle most of their own in state advertising. They need help out of state.
3. Seminars for informing the industry on everything impacting the industry.
 - A. Most of these needs would be meet by the State and state wide associations continuing theirs mini seminars and regional meeting educational opportunities.
4. They would like a forum by which they could all meet informally to network with the whole industry.
 - A. The Travel Federation of Iowa could work on this.
 - B. Put together a FAM trip just for themselves so they may visit each others operations.

EXPANSION PLANS



I. Riverboats.

1. Presidents.
 - A. Guest Services Barge.
 - B. No increase in employees.
 - C. Three year contract is coming up for the "Big One" and that is still unknown.
2. Sioux City Sue.
 - A. Contract with The Summit Group is pending on an agreement with Council Bluffs.
3. Ft Madison.
 - A. Unknown.
4. Dubuque
 - A. Unknown.

II. Dog tracks.

1. Bluffs Run.
 - A. No plans.
2. Waterloo Greyhound Park.
 - A. No plans.
3. Dubuque
 - A. No plans.

III. Horse track.

1. Pariere Meadows.
 - A. Want to build a horse show area. \$100,000.00 project.
 - B. Simulcast with The Woodlands.

IV. Indian Nation Casinos.

1. Casino Omaha.
2. Winn-A-Vegas
 - A. Just into their new property. No new plans.
3. Mesquaki Bingo and Casino.

GAMING INPUT



Bluffs Run.
 Randy Sliva
 Waterloo Greyhound Park
 Barb Johnson
 Kim Hovey
 Riverboat Development Aut.
 May Chamberlin
 WinnaVegas
 Richard Kissin
 Leilani Bernard
 President Riverboat Casino
 Bill Billings
 Prairie Meadows
 Shirley Beakler
 Sioux City Sue Casino Riverboat
 Peter LoLusich
 Dave Bohlke
 Clinton County Gaming
 Don Rhinenhart
 Burlington Gaming
 Mike Gould
 Task Force Chairman
 Rich Mills

**QUAD
CITIES
U.S.A**



CONVENTION
& VISITORS
BUREAU
IOWA • ILLINOIS

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P.O. BOX 3097
ROCK ISLAND, IL
61204-3097
(309) 788-7800
(800) 747-7800
FAX: (309) 788-7898

Riverboat
Gambling
Capital
of the
World

DAVENPORT
BETTENDORF
ROCK ISLAND
MOLINE

SCOTT COUNTY
ROCK ISLAND COUNTY

Friday November 19th, 1993

**COMMUNIQUE FROM: Quad Cities (Davenport & Bettendorf)
Convention & Visitors Bureau
Vince Lindstrom, Executive Director**

**Riverboat Development Authority
Davenport, Iowa (The PRESIDENT)
Mary Ellen Chamberlin, Chairman**

**Thank you for the opportunity to communicate to you the
importance of Riverboat Gambling as a catalyst for tourism
development in Iowa.**

**Riverboat gambling had its start in Iowa on April 1st 1991.
The President on Davenport riverfront and The Diamond Lady
on the Bettendorf riverfront were the first two boats on the
Mississippi River. The economic impact on the Quad Cities
has been in the millions of dollars. Hundreds of jobs have
been created and riverboat gambling became the catalyst for
millions of dollars in new construction and development.**

**When asked what has been the major impact of riverboat gambling
on the Quad Cities? The answer is clear. Riverboat gambling has
made the Quad Cities a year round tourism destination. We are
no longer playing seasonal tourism. You can no longer build
hotels, restaurants and attractions for a four month season.
We must be able to attract visitors (tourists & conventionaires)
365 days a year.**

**The riverboats have made this dream possible. We now have a
major attraction that is open twelve months of the year. Unfort-
unately, we have already lost the Diamond Lady because of Iowa
rules and regulations. A number of other boats have left Iowa
because they can make more money in other sights in other
states. Iowa is the losing the tourism battle. If we do not
change the limits and adjust the cruise schedules we will
ultimately loose the war.**

**We are ultimately talking jobs, tourism development and revenues
at both the state and local level. We must make the changes as
soon as possible. Our image is already in question. Paul Harvey
comes on the air and talks about the boats leaving Iowa for
better opportunities. Yes, we are building convention centers,
attractions, restaurants and museums. However, if we loose our**

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ROCK ISLAND
MOLINE

SCOTT COUNTY
ROCK ISLAND COUNTY

(2.)

**year round attraction we will also loose jobs, our number one
sell for regional and national conventions and we will loose
the grant funding from the non-profit (Riverboat Development
Authority).**

**The answer is clear. Raise or eliminate the betting limits
and lose limits. Make the cruise schedule market driven. Yes,
we should keep the concept of cruising on the river. However,
when to cruise and when to stay dock-side should be left to
the industry.**

**It does not make sense to have space limits for gaming. Visitors
go on the boats to play the machines and they do not understand
the why of the non-gambling space. It just does not make sense.**

**Finally, we must remember that tourism really happens at the
local level. Therefore, State Tourism should take the lead in
promoting Iowa to out of state visitors. The State can best sell
image. Iowa Tourism should also work with the industry and the
local tourism offices to coordinate marketing efforts.**

Historic Attractions Subcommittee
Recommendations to the Tourism 1999 Task Force

Defining "Historical Attractions:" The subcommittee recommends that "historical attractions" be defined to include geologic, prehistoric, and historic (1) buildings, structures, landscapes; (2) museums and sites (interpreted); (3) events; and (4) National Register properties and National Historic Landmarks.

Assumptions on Historical Attractions:

Historical attractions are underpromoted
Historical attractions are not all equal
Historical Preservation has a long term benefit to both the local community as well as to tourism
A primary mission of historical organizations is education
Iowans not well-informed about Iowa history/attractions
Historical attractions draw tourists
Some attractions are not ready or suitable for promotion--need to establish criteria/standards
Historical attractions have significant economic impact
Need more cooperation among state agencies dealing with historical attractions
Historical attractions are a leading player in tourism
Historical attractions are not self-supporting thorough admissions--the economic benefits go mainly to businesses which profit from the presence of historical attractions
Better liason is needed between historical attractions and the associated service economy

Mission Statement for Subcommittee: The mission is predicated on the assumptions outlined above, and is FINAL after subcommittee feedback and approval. "Given that Iowa has significant historical resources and attractions which research has shown to be major reasons for traveling in Iowa, the Tourism 1999 Task Force should make historic preservation, education, development, and promotion of historic resources and attractions its highest priority for investment."

The subcommittee recommends that the Tourism 1999 Task Force:

- (1) support the allocation of hotel-motel taxes to heritage tourism
- (2) support funding of the Iowa Community Cultural Grant program at the \$1 million per year level recommended by the RTL committee in 1987, and support funding the HRDP program at \$1 million per year
- (3) support the continued close cooperation of state agencies concerned with heritage tourism (DED, DCA, DNR, and DOT) and support increased interstate cooperation with tourism programs in adjoining states
- (4) support the study and re-evaluation of criteria used for promoting historic attractions
- (5) support the development of a Iowa state heritage tourism plan/program

LODGING ISSUES

Five Lodging Priorities:

1. Marketing: The Legislature should significantly increase the Division of Tourism's marketing budget for both in-state and out-of-state marketing. The Division's marketing budget should be funded at a level which would make the state's tourism industry competitive with surrounding states.
2. School Starting Date: The real issue concerning the school starting date and tourism is economics. Providing the opportunity for year-around K-12 schools or extending the current school year creates the potential for a dramatic loss in travel expenditures for the state tourism industry. For each day before Labor Day that K-12 schools are in session, the economic loss is approximately \$500,000.00 for the Okoboji area according to the Iowa Great Lakes Chamber of Commerce. With that in mind, a uniform starting date for schools should be set after Labor Day.
3. Accommodations Information: Lodging comprises the largest percentage of expenditures by travelers in Iowa with 28 percent of the total dollars spent per day according to the 1992 Iowa Welcome Center Survey. Thirty-one dollars and eighty-nine cents is spent per day on average by the surveyed travel parties out of a total of \$111.98. With lodging being such a large portion of travel expenditures, the subcommittee strongly recommends that the state provide complete accommodations information (including all hotels, motels, bed and breakfast establishments, and public and private campgrounds and cabins) to Iowa travelers. This information should be included in every primary fulfillment package sent. This could be done in one of two ways. Either the Division could compile and publish complete Iowa accommodations information (provided in the visitors guide or a separate guide). Or it could encourage and facilitate a public/private cooperative effort which would publish a guide and offer for use in the Division's fulfillment efforts.
4. Welcome Centers: The Lodging Subcommittee endorses the long-range plan for the state welcome centers and advocates its full-implementation. It also asserts that eventually all interstate welcome centers should be open year-around. Approximately one third of the surveyed users of the welcome centers said that the information and services provided extended their stay in Iowa. This information is from the 1992 Iowa Interstate and Pilot Project Welcome Center Survey.
5. Signage: The Department of Transportation should be more flexible when reviewing applications for tourism signage. Its current regulations are too rigid and arbitrary when it comes to serving the needs of the traveler and travel industry.

LODGING ISSUES
Page 2

Other Lodging Issues:

Taxation: Taxation on overnight accommodation facilities should be based on tangible property (not intangible) in order to be fair and straight-forward to the small business owner and consumer. Sixty-three percent of Iowa hotel/motels are showing a loss according to the Iowa Lodging Association. To tax intangible assets adds an unfair burden.

Unfair Competition: The Lodging Subcommittee believes that government should limit its activities to protecting and preserving the health, safety, and well-being of its citizens. It should not attempt to be a primary provider of services, duplicate, or improve upon services offered in the private sector, or otherwise undertake activities which lead to the offering of services that are or could be provided by private sector enterprise especially in regard to lodging services whether those services are similar to hotels, bed and breakfasts, or campgrounds.

SIGNAGE ISSUES

Signage is an issue which revolves around money. Whether it is the economic impact of travelers or the funding of the federal government, signage, one way or another, influences the spending of billions of dollars.

The over-riding issue is how can Iowa balance the need to regulate signage with the need to promote the tourism industry. Signage issues are listed below which reflect the existing needs of the tourism industry in light of the current DOT regulations.

1. The DOT's visitor count requirements should be enforced uniformly to all signage applicants.
2. The visitor count requirements should be relaxed for the benefit of the traveler and tourism industry.
3. The limitations on the number of signs at any one given location should be reviewed by the state or federal DOT.
4. New signage logos should be developed and used for the Iowa Welcome Centers and bed & breakfast inns.
5. Educational sessions on signage should be provided each year throughout the state. The annual fall tourism conference and the spring mini-conferences are examples of places which should feature such sessions among others.
6. Follow-up research or studies should be conducted on the impact of each sign after a given period of time. Signs which do not serve a purpose, do not offer any benefit to the traveler, or do not significantly impact the sign's benefactor, should be taken down.
7. Promoting changes in the federal DOT requirements should be a priority of the Travel Federation of Iowa.
8. Signs should be erected for a specific period of time with a review taking place at the end of that period.
9. The signs which serve the traveler and the tourism industry the most should have a priority over those which simply fit generic standards.

**Trails Task Force
Summary and Recommendations
7/7/93**

Task Force Committee Members:

Dean Alexander, National Park Service
Nancy Burns, Iowa Department of Transportation
Dick Bruns, Cedar Falls Parks and Recreation Department
Marvin Diemer, State Representative
Jim Green, The Des Moines Register
Bill Hillman, Southwest Iowa Nature Trails Inc.
Brian Holt, Hamilton County Conservation Board
Steve Kolbach, Northeast Iowa Tourism
Nancy Landess, Iowa Department of Economic Development
Tom Neenan, Iowa Trails Council
Bill Riley, Clear Lake
Arnie Sohn, Iowa Department of Natural Resources
Bob Sturgeon, Barr Nunn Trucking
Gerry Schnepf and Lisa Hein, Iowa Natural Heritage Foundation

Task Force Goals:

To encourage the utilization of the theme of Iowa as "The Trails State." Make Iowa number one in the nation in terms of its people, trail types, variety, accessibility and scenic quality to users.

Task Force Recommendations:

A. Materials

1. That trails be identified and included in future IDOT highway maps. That a criteria developed by IDOT based on trail mileage and usage be the limiting factors for inclusion on the map. In addition, development of a separate trail/bikeway map by IDOT.
2. That support be given to the proposed *Des Moines Register* trails map (oriented toward the ardent user) to increase the publication number from 20,000 to 50,000+.
3. That the IDOT trails inventory booklet be completed as quickly as possible.
4. That a return insert card be included within the general tourism piece developed annually by the Iowa Department of Economic Development that allows individuals to check a specific user category and request additional information, i.e. golfing, bicycling, hiking, etc.
5. That a pilot project of targeted mailing/promotion be explored by IDOT.
6. That an information item outlining contact names and addresses be developed for cross country skiing enthusiasts. Explore 1-800 numbers for cross-country skiing, biking, trails, winter conditions, events, etc. (1-800-SEE-IOWA)
7. INHF and Trails Council to coordinate trail guide efforts.

B. State Trails Week

That Iowa declare a state "Trails Week" that will include the National Trails Day. A possible theme is "Touching Reality Along Iowa's Landscape." This recommendation is based on:

- ♦ National leadership in numbers of rail/trail conversions
- ♦ Trails funding program through IDOT
- ♦ RAGBRAI - One of the largest organized bike rides in the nation
- ♦ Quality, enthusiasm, friendliness and support of Iowa citizens to trail users and visitors to the state
- ♦ Number and miles of snowmobile trails
- ♦ Number of historic railroad depots preserved along Iowa trails
- ♦ Number of equestrian trails and trail users
- ♦ Scenic road programs developed in the state
- ♦ Number and variety of nature and hiking trails in state, county and city parks
- ♦ Development of the Western Historic Trails Center in Council Bluffs
- ♦ Mormon Trail across Iowa
- ♦ Hard surfaced county road system
- ♦ Mississippi River Parkway (Great River Road)
- ♦ Canoe routes in the state
- ♦ River access program

C. Trails Advocacy Group

That IDOT establish a "Trails Advocacy Group" prior to 1994 that will meet the requirements of the Symms legislation. It is further recommended that such a group be charged with:

1. Active participation in trail planning efforts
2. Developing trail safety guidelines, signage and promotional programs
3. Promoting, marketing and organizing "Trails Week"
4. Developing a "Writers Bureau" for stories/articles to national magazines, etc.
5. Promoting trail usage and vacations as a "life-time" sport in Iowa schools
6. Evaluate state leadership on selected trails with statewide and interstate significance (American Discovery Trail)

D. Five Year IDOT Transportation Plan

That the IDOT contracted trails study be updated and adopted by IDOT and that it be incorporated in the IDOT Five-Year Transportation Plan.

E. Networking

Improve coordination between agencies receiving requests for information. Explore ways to better service users. Coordinate marketing efforts specifically the DNR, DOT & DED need to establish a "Tourism Marketing Review" Committee. This committee should meet periodically to review and coordinate servicing/marketing efforts for consistency, quality and theme opportunities.

F. Midwest States

Bring together the Midwest States to develop a regional marketing and development plan for trails.

OUTDOOR RECREATION

Develop and promote winter activities try to make winter a positive; which might be impossible !

Improve promotion.

The public toilets at the swimming beaches at Rathburn Lake need modern commodes and running water. The Corps of Engineers haven't made any improvements for nearly 30 years. Can't the tourism force get involved in problem solving?

Insurance regulations need to be changed so that the people who provide recreation can afford to do it. An assumption of risk law needs to be passed similar to Colorado. Horseback riding trails and bike trails need to be built up and down rivers, etc. Cross-country skiing and snowmobiling should be highlighted.

Publicizing festivals separately in a calendar of events; like a rotating menu. Each year it has same, new events, and different times.

Promote our "clean" everything.

Winter recreation important, too!

Emphasize this! We have the great Mississippi River! This should be developed with parks, boat accesses, and especially fish stocking to insure future fishing. People will travel to fish this river and fishing has more adherent than any other sport in the world.

Huge reservoir for tourism. Separate state wide rich brochures on area of recreation would be nice.

Promote canoeing on the Boone River from Eagle Grove to conference with Des Moines River and from there on to Des Moines. One of the best canoeing in the state.

Complete brochure by region.

As we move further from agriculture economy it becomes more meaningful for city dwellers to get outdoors, to know what is out there and appreciate what Iowa has to offer.

We should focus more on 4 seasons.

We need to sell Iowa more for outdoor recreation. The big federal lakes provide tremendous opportunities for marketing. These areas are public land and water and have unlimited recreations activities available.

Iowa ranks third in number of trails or miles. It is a wonderful resource in need of future advertising.

Need to improve Prairies Rose State Park area near Harlan.

Outdoor recreation opportunities are endless. People will come to Iowa for its great open space and hospitality. The existing recreation facilities need to be promoted and assistance in developing new facilities is needed.

Let us know so we can tell out-of-state visitors to attend while in the area.

People need to be more aware of what the County Conservation systems have to offer.

We have it, but we have to make it worth while for people to use it.

Iowa has many beautiful natural parks and these need all the publicity they can get.

One of our greatest assets...we need to improve the public image of Iowa by adding to the published photos in big magazines of Iowa.

Do a complete brochure by region with maps, information, beaches, facilities etc.

Good results from local mail-out material.

Do more to promote bicycling. Iowa has more miles of bike trails than any other state, great secondary road system for biking, excellent biking terrain.

Closer working relationship with DNR and coordination of publications. Host more division and region meetings at park locations.

Limited right here. Believe strongly we need a listing of camping and recreation areas in some state tourism publication. (both private and public)

Here again, Iowa has many facilities that are little known.

There is a wealth of recreation opportunities in Iowa, especially non-consumptive ones. We probably should all be paying more attention to active sports like canoeing and biking, as well as, bird watching and wildflower hunting. It would be great for Iowa to really plug into eco-tourism as a preservation of what we have, more than a using up.

Stress county and local parks as well as state ones.

Getting the word out about camping, fishing, and trails, is imperative. Again, WITR has published an excellent guide for Western Iowa.

More sun this year, one of Iowa's great strengths too.

A map of the state with a written description of facilities available would be nice.

DNR and County Conservation does a good job of providing info for camping etc, but would like to see directory of city owned and privately operated campgrounds.

Outdoor recreation is important when we realize how few people have the luxury of working on the farm. Outdoor recreation is a good investment.

Separate directory.

Support activity, increase seasons, society may be getting lazier, and more remote control.

Iowa can't compete, Yellow State Forest is completely un-marketed and poorly signed.

Starting to see working relations with DNR. Funding again needs to be increased for these areas to be promoted to visitors.

The state park program is important to maintain. Returning \$ to this program for upkeep and accessibility as in the past, is essential to any tourism program.

TOURISM 1999 TASK FORCE

OUTDOOR RECREATION SUBCOMMITTEE

TOP TEN RECOMMENDATIONS

- 1) Assign a high priority to outdoor recreation as an important component to Iowa Tourism.
- 2) Emphasize Iowa's little known natural beauty and attractions in tourism promotion efforts.
- 3) Highlight Iowan's courtesy, friendliness and high quality service in tourism promotion for outdoor recreation opportunities.
- 4) Highlight visitor safety and excellent transportation access as important features of Iowa outdoor recreation opportunities.
- 5) Place greater emphasis on promotion of opportunities for outdoor sports in Iowa throughout the year, examples include: fishing, pheasant hunting, trails, bicycling, canoeing.
- 6) Foster regional linkages and public/private relationships among outdoor recreation providers in order to facilitate cross promotion and quality experiences.
- 7) Recognize the importance of well-maintained facilities and well-trained staff in creating a positive experience and generating return visits.
- 8) Support long-term, secure sources of funding for development and care of outdoor recreation infrastructure.
- 9) Support long-term, secure sources of funding for tourism promotion of outdoor recreation in Iowa
- 10) Develop partnerships between recreation providers and local communities to generate more community-based support for outdoor recreation projects.

AGENDA
TOURISM 1999
COMMUNITY MEETINGS

- A. Introductions
Tourism Staff Member and Task Force Member
Attendees
- B. Overview of Tourism 1999
- C. Impact of Travel on Iowa Counties (US Travel Data
Center) - Tourism Staff Member
- D. Longwoods International Study - Tourism Staff Member
- E. Industry Survey Results - Task Force Member
- F. Questions/Answers and Local Concerns

TOURISM 1999 COMMUNITY MEETINGS

All meetings are from 7-9 p.m. unless noted otherwise.

Monday, July 19

Kingsley Inn
707 Avenue H
Ft. Madison
(contact: Liane Smith)

Tuesday, July 20

Community Center
141 N Lawler, Hwy 51N
Postville
(contact: Steve Kolbach)
AND
Davenport Library
321 Main
Davenport
(contact: Vince Lindstrom)

Wednesday, July 21

Waterloo Rec & Art Ctr.
Law Court Theatre
225 Commercial
Waterloo
(contact: Terry Poe)
AND
Ramada Inn/City Center
4747 1st Ave., SE
Cedar Rapids
(contact: Jim Garrett)

Thursday, July 22

Dubuque Welcome Center
Third Street & Ice Harbor
Dubuque
(contact: Marilee Fowler)

Monday, August 2

Community Hall
528 Park Avenue
Story City
(contact: Jody Graden)

Tuesday, August 3

Willow Room
Botanical Center
Des Moines
(contact: Rich Harter)

Wednesday, August 4

Conference Room
Chamber Office
15 1st St., NE
Mason City
(contact: Katie O'Brien)

Thursday, August 5

Indian Hills Community College
525 Grandview Avenue
Ottumwa
(contact: Becky Griffiths)

Monday, August 9

Sioux County State Bank
105 Albany Ave., SE
Orange City
(contact: Mary Lou VanderWel)

Tuesday, August 10

Sioux City Convention Center
801 4th Street
Sioux City
(contact: Roger Shultz)

Wednesday, August 11

East Side Shelter House
Swan Lake State Park
Carroll
(contact: Dave Olson)

Thursday, August 12

City Council Chamber
in the Old Depot
116 W. Adams
Creston
(contact: Cheri Huber)

AND

Robert D. Looft/Continuing Ed. Center
Auditorium/IA Western Comm. College
Council Bluffs
(contact: Kari McClure)

AND

Lost Island Nature Center
Ruthven
(contact: Renee' Jedlicka)
NOTE: 4-6 pm meeting

TOURISM 1999

TASK FORCE

State of Iowa
200 East Grand
Des Moines, Iowa 50309

Report of Surveys - June 1993

237 Private Sector Operations (Physical Attractions and/or Annual events)

53 Chambers of Commerce and Visitors Bureaus

32 Private Organizations and Interest Groups

Analysis: C. S. Everett

Management and Marketing

Des Moines, Iowa

Introduction:

Tourism 1999, a year-long Task Force established by the Iowa Senate, is studying the Iowa Tourism industry. These survey results provide input for its five-year planning process.

The report summarizes June 1993 survey responses from:

- a) 237 Private Sector Operations (Physical Attractions and/or Annual events)
- b) 53 Chambers of Commerce and Visitors Bureaus
- c) 32 Private Organizations and Interest Groups

The survey asked:

- a) about their organizations and participation in Tourism activities.
- b) perceptions of the State's Tourism program.
- c) recommendations of future promotional efforts.
- d) suggestions for publication development.
- e) comments on a range of topics.

In general the survey covers:

- Facilities, events and organizations
- Advertising and Promotion
- The Regional System
- Welcome Centers
- Publications
- Promotional Efforts

Contents:

Introduction

Who responded

Highlights and Conclusions

- How they feel about the Tourism program
- Comparison- groups which have attended events and those who have not
- In what directions should Tourism move?

Tabulations:

A) by Private Sector N=237 and Chambers of Commerce N=53

- Organization characteristics
- Extent of participation
- How they feel about the Tourism programs
- In what directions should Tourism move?
- Their plans

B) by Region (West N=67 Central N=77 East N=92)

- Extent of participation
- How they feel about the Tourism program
- In what directions should Tourism move?
- Their plans

Appendix:

Analysis results and original surveys for;

- Private Sector (237)
 - a) those attending at least one event and those, none
 - b) region (Western, Central, Eastern)
- Chambers of Commerce (53)
- Private Organizations (32)

Who Responded?

Almost three times as many responded as did for a survey seven years earlier.

Survey date (# Responses)	PS = Private Sector	CC = Chambers of Commerce	PO = Private Organizations
June 1993 (322)	237	53	32
October 1986 (117)	68	10	39

Descriptions of Groups:

a) [237] Private Sector (PS): (PS Q 1)

1) Region where located:

	Western	Central	Eastern
Percentage %	28%	32%	39%
Number of (237)	67	77	92

2) Their nature:

- 14% annual events, festivals or celebrations which used a facility not under their control. (e.g. an art festival held in a city park.)
- 3% annual events, festivals or celebrations which controlled their own property. (e.g. county fairs)
- 61% physical attractions composed of land, buildings, activities open through a particular season or the entire year. (e.g. Adventureland, bed and breakfast.)
- 18% combinations of physical attractions and annual events. (e.g. Pella Historic Village and Tuliptime.)

b) [53] Chambers of Commerce (CC):

Also included Conventions and Visitors Bureaus.

c) [32] Private Organizations and Interest Groups (PO):

1) Had organized on the basis of common interest. (PO Q 1)

- 22% Governmental agencies collectively acting for their common interests and concerns.
- 22% Individuals acting jointly in supporting certain social or environmental positions or programs.
- 13% Businesses collectively acting for their common interests or concerns.
- 6% Individuals with special and personal interests in personal development.
- 6% Individuals with professional and technical interests.
- 31% Other

2) Their particular interests focused on: (PO Q 2-3)

- 38% Tourism
- 16% General business development
- 9% History interpretation and preservation
- 9% Natural resource protection
- 6% Education
- 6% Recreation Activity and programs
- 16% Other

Highlights and Conclusions:

- **More than 320 tourism industry representatives responded.**
 - a) Returns approximately tripled those from an earlier study (322 vs 117) in October 1986.
 - b) Chambers of Commerce/Visitor Bureaus experienced the largest increase (53 vs 10.)
 - c) Private sector organizations increased to 237 (from 68.)
- **About half of Private Sector and Chambers of Commerce seem familiar and pleased with the State Tourism program.**

Extent of participation

 - a) They:
 - 1) accurately identify their region.
 - 2) feel familiar with Regional operation.
 - 3) have participated in co-operative advertising.
 - 4) have used Welcome Centers.

How they feel about the Tourism program

 - b) The group feels that Welcome Centers have been a real promotional asset.
 - c) They generally feel that the Iowa Visitor's Guide has been valuable to their promotion.
 - d) The respondents, however, give the Regional Office support mixed reviews.
(Detail appears on pages 10 - 14.)
- **The other half of Private Sector respondents appear less knowledgeable and less enthusiastic.**

The more "positive group" has participated in some Tourism programs; the other has not.

 - a) 61 % have attended at least one of seven tourism programs. (Attend one or more)
 - b) 39% of the group have attended none. (Had not attended)
(Comparisons follow on pages 7 - 9.)
- **Private Sector and Chambers of Commerce agree substantially on:**
 - a) how Regional offices could support them;
 - b) on topics for three new brochures;
 - c) on 1994 State promotional efforts.
(Detail appears on next page.)
- **Statistically responses showed no differences by region.**
(Analysis by region appears on pages 15 - 18.)

In what directions should Tourism efforts move?

- **How would you like to see the regional office support your efforts? (PS Q 21-26) (CC Q 24-29)**

Private sector groups set priorities a bit differently from the Chambers.

	Private Sector	Chambers of Commerce	Combined Ranking
Regional advertising	109	109	218 (1)
Inquiry generation	108	111	219 (1)
Co-op ad support	107	101	208 (4)
Funding opportunities	105	106	211 (3)
Technical support	88	85	173 (5)
Education opportunities	85	88	173 (5)

Note: Original rankings were weighted 8 (1st choice) -6-4-3-2-1.
100 = index of average response. (10 = one standard deviation)

- **Which three new brochures in 1994 would you add? (PS Q 32-40) (CC Q 33-41)**

PS and CC agreed: Historic attractions (by a wide margin)
Outdoor recreation
Scenic byways.
- **Which five promotional efforts would most impact your interests? (PS 48-59) (CC Q 49-60)**

PS and CC agreed on four of the five. Here are the % of each group which chose them.

The Promotional Effort	% of PS who chose	% of CC who chose
Historic Attractions	78 (1)	77 (1)
Group Travel	67 (2)	70 (2)
Sightseeing	63 (3)	38 (5)
Scenic Byways	58 (4)	51 (4)
Arts and Culture	41 (5)	40 (5)
Agricultural	30	62 (3)

● How would you like to see the regional office support your efforts? (PS Q 21-26)

	Attending One or more	Attending No events
Regional advertising	109	108
Co-op ad support	109	104
Inquiry generation	106	110
Funding opportunities	103	106
Technical support	88	88
Education opportunities	84	84

Note: Original rankings were weighted 8 (1st choice) -6-4-3-2-1.
100 = index of average response. (10 = one standard deviation.)

Tabulations:

A) Private Sector [N=237] and Chambers of Commerce [N=53]:

PS = Private Sector responses; (PS Q #) = Private Sector survey Question #.
CC = Chambers of Commerce responses; (CC Q #) = Chamber of Commerce survey Question #.
PO = Private Organization responses; (PO Q #) = Private Organization survey Question #.

In some cases totals shown will add up to less than 100%.
(No Comment % , often not shown, has been considered as a response.)

Appendix contains the complete response summaries.

Organization Characteristics:

- Tax status:
PS 40% Profit, 56% Non-profit (PS Q 2)
- Age of Facility or Organization:
PS 18% 4 yrs or less 28% five to ten yrs 53% eleven or more yrs. (PS Q 3)
CC 13% " 19% " 66% " (CC Q 4)
- Months of Operations:
PS 14% One mo. or less, 19% six or seven, 47% year 'round (PS Q 6)
- Seasons of Operation:
PS 19% Summer, 24% Spr-Summer-Fall, 46% year 'round (PS Q 5)

Extent of Participation:

- Have they used cooperative advertising programs?
PS 53% have used them. (PS Q 13)
CC 57% " (CC Q 12)
- Which co-op advertising media most effective meets you needs?
PS 40% newspaper 14% magazine 10% Direct Mail (PS Q 14)
CC 53% " 17% " 11% " (CC Q 17)
- Approximately how many Welcome Centers have you used in the last year?
PS 21% None 35% one to eight 39% nine or more. (PS Q 27)
CC 13% " 39% " 42% " (CC Q 30)

- Which of the following have you attended during the last year?

PS	61% have attended at least one of these programs:	(PS Q 41-47)
CC	81% " "	(CC Q 42-48)
	PS	CC
	Mini-conferences	36% 64%
	State Fair Tourism Bldg	35% 45%
	a Regional meeting	28% 47%
	State Tourism Conference	28% 49%
	a Travel Show	25% 42%
	Leadership Certification	16% 19%
	TEAM/CEPP	11% 30%

PS 39% of Private Sector have attended none.

How they feel about the Tourism Division programs:

- "I am very familiar with the Regional system."

PS	44% agreed	23% neutral	19% disagreed with the statement.	(PS Q 18)
CC	53% "	25% "	15% "	(CC Q 21)

- Can they accurately identify their region?

PS	47% can identify	52% uncertain	(PS Q 19)
CC	66% "	34% "	(CC Q 22)

- "The Regional Office has given me valuable support and help."

PS	24% agreed	27% neutral	27% disagreed	(PS Q 20)
CC	41% "	30% "	19% "	(CC Q 23)

- "When we have used them, Welcome Centers have been a real asset to our promotional effort."

PS	49% agree	21% neutral	6% disagree.	(PS Q 28)
CC	59% "	17% "	4% "	(CC Q 31)

- "The Iowa Visitor's Guide has been very valuable to our promotional program."

PS	41% agree	29% neutral	12% disagree.	(PS Q 31)
CC	56% "	25% "	9% "	(CC Q 32)

In what directions should Tourism efforts move?

- What % of Division of Tourism expenditures should we spend in-State?

PS	21% suggested (0 to 20%)	56% said (30 to 50%)	9% thought (75 or 100%).	(PS Q 16)
CC	30% "	62% "	4% "	(CC Q 19)

- How would you like to see the regional office support your efforts? (Q 21-26)

Rank these from 1 (most important) to 6 (least.)

	PS	CC
Co-op advertising support	107	101
Funding opportunities	105	106
Technical support	88	85
Regional advertising	109	109
Educational opportunities	85	88
Inquiry generation	108	111

(Q 21-26) (Q 24-29)

Note: Original rankings were weighted 8 (1st choice) -6-4-3-2-1.

100 = index of average response. (10 = one standard deviation)

- If the state could add three new brochures in 1994, which three should they be?

Identify by . . . #1 (first choice), #2 (second), #3 (third).

	PS	CC
Outdoor Recreation	108	113
Arts and Culture	98	101
Scenic Byways	104	110
Historic Attractions	123	115
Bed and Breakfasts	96	90
Winter activity	91	96
Lodging	91	88
Restaurants	92	88
Antiques	97	101

(Q 32-40) (Q 33-41)

Note: Original rankings were weighted 4 (1st choice) -2-1.

100 = index of average response. (10 = one standard deviation)

- If the State were to expand promotional efforts within the next five years, which five of the following would have most impact on your interests?

	% of PS	% of CC
Historic attractions	78 (1)	77 (1)
Group Travel	67 (2)	70 (3)
Sightseeing	63 (3)	38 (4)
Scenic Byways	58 (4)	51 (3)
International	20	28
Arts and Culture	41 (5)	40 (4)
Natural Resources Lakes	27	25
Agricultural	30	62 (2)
Multi-use Trails	25	34
Golf	15	19
Riverboats	11	11
Casinos	8	8

(PS Q 48-59) (CC Q 49-60)

Their Plans: (Private Sector and Chambers)

- The Month they find most convenient to attend State Tourism Conference. (PS Q 9-10) (CC/PO Q 8-9)

Group	Count	Jan	Feb	Mar	Apr	May	Jun
Private Sector	237	16%	15%	12%	9%	4%	5%
Chambers of Commerce	53	6%	2%	17%	9%	2%	2%
Private Organizations	32	3%	28%	6%	3%	6%	3%
Weighted Average as %	100%	13%	14%	12%	8%	4%	4%
Totals	322	42	46	39	27	12	14

Group	Count	Jul	Aug	Sep	Oct	Nov	Dec
Private Sector	237	2%	6%	5%	16%	8%	1%
Chambers of Commerce	53	2%	0%	13%	40%	6%	0%
Private Organizations	32	3%	3%	9%	22%	6%	0%
Weighted Average as %	100%	2%	5%	7%	21%	7%	1%
Totals	322	7	15	22	66	24	2

- How much are you willing to spend on coop advertising with the State?
PS 21% said no \$ 33% up to \$250 15% to \$500 7% to \$1000 9% > \$1000 (PS Q 15)
CC 21% " 26% " 9% " 6% " 25% " (CC Q 18)
- How much would you be willing to pay to be listed in the State's Group Tour Manual?
PS 16% said no \$ 23% up to \$25 18% to \$50 19% to \$100 12% > \$100 (PS Q 17)
CC 21% " 8% " 21% " 15% " 23% " (CC Q 20)
- "I am willing to pay to have my brochure distributed at a Welcome Center."
PS 11% agreed 11% neutral 31% disagreed (47% no comment) (PS Q 29)
- How much would you be willing to pay for brochure distribution through a Center?
PS 38% said no \$ 11% up to \$10 9% above that (43% no comment) (PS Q 30)

Tabulation:

B) by Regions - Private Sector

Western [N=67] Central [N=77] Eastern [N=92]

Extent of Participation:

- Have they used cooperative advertising programs? (PS Q 13)

Region:	Used	Not used
Western	60 %	40 %
Central	56 %	44 %
Eastern	47 %	53 %

- Approximately how many Welcome Centers have you used in the last year? (PS Q 27)

Region:	None	1 - 8	9 - 18	No comment
Western	21 %	28 %	43 %	7 %
Central	19 %	37 %	41 %	3 %
Eastern	23 %	38 %	35 %	4 %

- Which of the following have you attended during the last year? (PS Q 41-47)

	Western	Central	Eastern
State Tourism Conf	21 %	25 %	37 %
Mini-conferences	31 %	38 %	39 %
Travel Show	27 %	26 %	23 %
Leadership Cert	15 %	12 %	20 %
TEAM/CEPP	15 %	12 %	7 %
Regional Meeting	25 %	23 %	35 %
State Fair Tourism Bldg	25 %	45 %	33 %

How they feel about the Tourism Division activities:

- "I am very familiar with the Regional system." (PS Q 18)

Region:	Agree	Neutral	Disagree	No Comment
Western	37 %	30 %	21 %	12 %
Central	49 %	23 %	15 %	12 %
Eastern	44 %	18 %	20 %	19 %

- Can they accurately identify their region? (PS Q 19)

Region:	Identified	Uncertain
Western	43 %	57 %
Central	47 %	53 %
Eastern	50 %	50 %

- "The Regional Office has given me valuable support and help." (PS Q 20)

Region:	Agree	Neutral	Disagree	No Comment
Western	31 %	19 %	29 %	19 %
Central	23 %	32 %	22 %	22 %
Eastern	20 %	29 %	28 %	22 %

- "When used, Welcome Centers have been a real asset to our promotional effort." (PS Q 28)

Region:	Agree	Neutral	Disagree	No Comment
Western	64 %	10 %	4 %	20 %
Central	42 %	25 %	9 %	25 %
Eastern	46 %	25 %	5 %	24 %

- "The Iowa Visitor's Guide has been very valuable to our promotional program." (PS Q 31)

Region:	Agree	Neutral	Disagree	No Comment
Western	41 %	31 %	13 %	13 %
Central	41 %	26 %	9 %	23 %
Eastern	38 %	30 %	14 %	18 %

In what directions should Tourism efforts move?

- How would you like to see the regional office support your efforts? (PS Q 21-26)
Rank these from 1 (most important) to 6 (least.)

	Western	Central	Eastern
Coop ad support	110	106	105
Funding opportunities	102	108	104
Technical support	94	87	87
Regional advertising	112	107	106
Educational opportunity	82	85	86
Inquiry generation	100	107	112

Note: Original rankings were weighted 8 (1st choice)-6-4-3-2-1.
100 = index of average response. (10 = one standard deviation.)

Their Plans:

- How much are you willing to spend on coop advertising with the State? (PS Q 15)

Region:	No \$	to \$250	to \$500	to \$1000	> \$1000	No Comnt
Western	16 %	49 %	12 %	3 %	6 %	13 %
Central	26 %	22 %	14 %	10 %	10 %	17 %
Eastern	20 %	30 %	16 %	8 %	9 %	16 %

- How much would you be willing to pay to be listed in the State's Group Tour Manual? (PS Q 17)

Region:	No \$	to \$25	to \$50	to \$100	> \$100	No Comnt
Western	10 %	25 %	22 %	27 %	6 %	9 %
Central	14 %	26 %	21 %	12 %	12 %	16 %
Eastern	22 %	18 %	13 %	20 %	16 %	11 %

- "I am willing to pay to have my brochure distributed at a Welcome Center." (PS Q 29)

Region:	Agree	Neutral	Disagree	No Comment
Western	12 %	13 %	36 %	38 %
Central	10 %	9 %	26 %	54 %
Eastern	11 %	10 %	33 %	46 %

- How much would you be willing to pay for brochure distribution through a Center? (PS Q 30)

Region:	No \$	\$10	\$15	\$20	> \$20	No Comnt
Western	46 %	13 %	1 %	1 %	1 %	36 %
Central	30 %	12 %	1 %	1 %	4 %	52 %
Eastern	38 %	10 %	2 %	2 %	7 %	40 %

[. . . end tabulations]

Tourism 1999 Task Force, State of Iowa - June 1993
Private Sector Questionnaire

Survey Item Analysis C. S. Everett

Subset Questions ... and Responses:

237 OF 237 = 100 %
<--- Responses in % ---> (No Comment %)

About the Facility or Event:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

1 Nature of facility/event:
Unowned/ Owned/Attrctn/Att&evt/
14% 3% 61% 18% (NC 3%)

2 Tax status (profit/non-prof):
Profit/NonProf/
40% 56% (NC 4%)

3 Age of facility/event:
0-1 yr/2-4 yrs/5-10 yr/> 11 yr/
4% 14% 28% 53% (NC 2%)

4 Annual visitation:
0-500/ - 1000/ - 2500/ - 5000/- 10000/- 25000/- 50000/-100000/>100000/
11% 7% 13% 12% 11% 12% 11% 8% 11% (NC 5%)

5 Seasons of operation:
Winter/ Spring/ Summer/ Fall/Spr&Smr/Sp&S&Fl/Sum&Fal/Fl &Wtr/ All Yr/
1% 3% 19% 1% 2% 24% 2% 1% 46% (NC 1%)

6 Months of operation:
0-1/ 2-3/ 4-5/ 6-7/ 8-9/ 10-11/ 12/
14% 3% 7% 19% 5% 3% 47% (NC 3%)

7 Paid staff size:
None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
30% 14% 12% 10% 15% 10% 3% 2% 4% (NC 2%)

8 Volunteer staff size:
None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
30% 2% 10% 5% 10% 13% 11% 5% 13% (NC 3%)

9 Best Mo.-Tour Conf (Jan-Jun):
Jan/ Feb/ March/ April/ May/ June/
16% 15% 12% 9% 4% 5% (NC 38%)

10 Best Mo.-Tour Conf (Jul-Dec):
July/ August/ Sept/ Oct/ Nov/ Dec/
2% 6% 5% 16% 8% 1% (NC 63%)

Advertising and Promotion:

* - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

11 Total Budget (Mktg/Promtn):
\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$9000/- \$20000/- \$50000/>\$50000/
3% 13% 10% 13% 19% 17% 8% 6% 5% (NC 5%)

#12 Advertising budget:
\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$9000/- \$20000/- \$50000/>\$50000/
8% 16% 13% 14% 19% 11% 6% 3% 5% (NC 6%)

#13 Coop ads - used at all?:
Notused/ Used/
47% 53%

#14 Most effective coop media:
Newsppr/Televisn/ Radio/Magzine/DirMail/ Other/
40% 6% 9% 14% 10% 6% (NC 15%)

#15 How much coop ad spending?:
\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$6000/- \$10000/>\$10001/
21% 33% 15% 7% 4% 3% 1% 1% (NC 16%)

#16 In-state Tourism Spending:
0%/ 10%/ 20%/ 30-40%/ 50%/ 75%/ 100%/
1% 5% 15% 27% 29% 8% 1% (NC 16%)

#17 Pay for Grp Tour Mktg list?:
\$0/ \$1-25/ \$26-50/\$51-100/ - \$250/ - \$500/- \$1000/> \$1001/
16% 23% 18% 19% 9% 3% (NC 12%)

The Regional System:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#18 Am familiar w/Reg'nal system
StrAgree/ Agree/Neutral/Disagre/StrDisa/Not App/
12% 32% 23% 11% 8% 5% (NC 9%)

#19 Know their region?:
Knows/ Unsure/
47% 52% (NC 1%)

#20 Region Off valuable support!
StrAgree/ Agree/Neutral/Disagre/StrDisa/Not App/
4% 20% 27% 16% 11% 11% (NC 11%)

#21 More coop adv support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
18% 16% 11% 9% 6% 9% (NC 31%)

#22 More funding opportunities?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
21% 9% 11% 10% 6% 13% (NC 31%)

#23 More technical support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
8% 5% 11% 13% 16% 12% (NC 35%)

#24 More Regional advertising?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
18% 15% 16% 8% 8% 5% (NC 30%)

#25 More educatnal opportunity?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
5% 9% 6% 11% 18% 16% (NC 35%)

#26 More inquiry generation?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
21% 11% 10% 13% 8% 10% (NC 28%)

Welcome Centers:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#27 Welcome Centers # used:
None/ One/ 2 - 4/ 5 - 8/ 9 - 12/13 - 18/
21% 9% 14% 12% 13% 26% (NC 5%)

#28 Welcome Centers real assets!
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
17% 32% 21% 4% 2% 12% (NC 11%)

#29 Am willing to pay Ctr fees!:
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
3% 8% 11% 16% 15% 24% (NC 23%)

#30 Fees - how much per Ctr?:
\$ 0/ \$ 10/ \$ 15/ \$ 20/ \$ 25/Gtr \$25/
38% 11% 2% 2% 3% 2% (NC 43%)

Publications:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#31 Visitor's Guide very valuabl
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
13% 28% 29% 7% 5% 11% (NC 7%)

#32 Add Outdoor Rec brochure?:
Rank 1/ Rank 2/ Rank 3/
26% 7% 9% (NC 58%)

#33 Add Arts/Culture brochure?:
Rank 1/ Rank 2/ Rank 3/
12% 5% 10% (NC 73%)

#34 Add Scenic Byway brochure?:
Rank 1/ Rank 2/ Rank 3/
14% 16% 14% (NC 56%)

#35 Add Historic Att brochure?:
Rank 1/ Rank 2/ Rank 3/
40% 19% 11% (NC 30%)

#36 Add Bed/breakfast brochure?:
Rank 1/ Rank 2/ Rank 3/
12% 3% 5% (NC 80%)

#37 Add Winter Activity brochure
Rank 1/ Rank 2/ Rank 3/
3% 5% 8% (NC 85%)

#38 Add Lodging brochure?:
Rank 1/ Rank 2/ Rank 3/
5% 3% 3% (NC 89%)

#39 Add Restaurant info brochure
Rank 1/ Rank 2/ Rank 3/

6% 5% 5% (NC 84%)

#40 Add Antiques Info brochure?:
Rank 1/ Rank 2/ Rank 3/
7% 13% 11% (NC 68%)

Promotional Efforts:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#41 Been to State Tourism conf:
Attend/NoAttnd/
28% 72%

#42 Been to Mini-conferences:
Attend/NoAttnd/
36% 64%

#43 Been to Travel show:
Attend/NoAttnd/
25% 75%

#44 Been to Ldrshp certificat'n:
Attend/NoAttnd/
16% 84%

#45 Been to TEAM/CEPP:
Attend/NoAttnd/
11% 89%

#46 Been to Regional meeting:
Attend/NoAttnd/
28% 72%

#47 Been StateFair Tourism Bldg:
Attend/NoAttnd/
35% 65%

#48 Expand scenic byways:
Impact/
58% (NC 42%)

#49 Expand international:
Impact/
20% (NC 80%)

#50 Expand Corps Lakes:
Impact/
27% (NC 73%)

#51 Expand casinos:
Impact/
8% (NC 92%)

#52 Expand riverboats:
Impact/
11% (NC 89%)

#53 Expand historic attractions:
Impact/
78% (NC 22%)

#54 Expand Group Travel:
Impact/
67% (NC 33%)

#55 Expand golf:
Impact/
15% (NC 85%)

#56 Expand agricultural pgms:
Impact/
30% (NC 70%)

#57 Expand Arts & culture:
Impact/
41% (NC 59%)

#58 Expand Multi-use trails:
Impact/
25% (NC 75%)

#59 Expand sightseeing:
Impact/
63% (NC 37%)

Location and Co-op Media:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#60 Region where located:
West Rg/Cnt Rgn/East Rg/
28% 32% 39% (NC 0%)

#61 Coop ads- Radio Iowa?:
Used/
15% (NC 85%)

#62 Coop ads-Vacation Value Dir?
Used/
22% (NC 78%)

#63 Coop ads - News insert?:
Used/
31% (NC 69%)

#64 Number of Events Attended:
Attnd 1/Attnd 2/Attnd 3/Attnd 4/Attnd 5/Attnd 6/ At All/
18% 15% 9% 5% 5% 6% 3% (NC 39%)

[End of report]

Tourism 1999 Task Force, State of Iowa - June 1993
Private Sector Questionnaire

Survey Item Analysis

C. S. Everett

Subset Questions

... and Responses:

64 Number of Events Attended

1 Attnd 1 or
2 Attnd 2 or
3 Attnd 3 or
4 Attnd 4 or
5 Attnd 5 or
6 Attnd 6 or
7 At All

144 OF 237 = 61 %

<--- Responses in % ---> (No Comment %)

About the Facility or Event:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

1 Nature of facility/event:

Unowned/ Owned/Attrctn/Att&evt/
13% 2% 63% 19% (NC 3%)

2 Tax status(profit/non-prof):

Profit/NonProf/
38% 58% (NC 4%)

3 Age of facility/event:

0-1 yr/2-4 yrs/5-10 yr/> 11 yr/
3% 14% 29% 52% (NC 1%)

4 Annual visitation:

0-500/ - 1000/ - 2500/ - 5000/- 10000/- 25000/- 50000/-100000/>100000/
8% 8% 10% 12% 9% 13% 11% 10% 15% (NC 5%)

5 Seasons of operation:

Winter/ Spring/ Summer/ Fall/Spr&Smr/Sp&S&Fl/Sum&Fal/Fl &Wtr/ All Yr/
1% 1% 16% 1% 1% 28% 1% 1% 49% (NC 1%)

6 Months of operation:

0-1/ 2-3/ 4-5/ 6-7/ 8-9/ 10-11/ 12/
10% 3% 8% 15% 8% 3% 49% (NC 3%)

7 Paid staff size:

None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
24% 13% 13% 13% 15% 11% 2% 3% 6% (NC 1%)

8 Volunteer staff size:

None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
28% 10% 3% 10% 15% 12% 4% 15% (NC 3%)

9 Best Mo.-Tour Conf(Jan-Jun):

Jan/ Feb/ March/ April/ May/ June/
13% 18% 10% 8% 3% 6% (NC 42%)

#10 Best Mo.-Tour Conf(Jul-Dec):

July/ August/ Sept/ Oct/ Nov/ Dec/
3% 5% 6% 19% 13% 1% (NC 53%)

Advertising and Promotion:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#11 Total Budget (Mktg/Promtn):
 \$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$9000/- \$20000/- \$50000/>\$50000/
 1% 8% 10% 13% 17% 19% 9% 8% 8% (NC 6%)

#12 Advertising budget:
 \$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$9000/- \$20000/- \$50000/>\$50000/
 6% 11% 13% 15% 17% 11% 9% 5% 7% (NC 6%)

#13 Coop ads - used at all?:
 Notused/ Used/
 38% 63%

#14 Most effective coop media:
 Newsppr/Televisn/ Radio/Magzine/DirMail/ Other/
 36% 6% 13% 17% 8% 6% (NC 15%)

#15 How much coop ad spending?:
 \$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$6000/- \$10000/>\$10001/
 15% 29% 19% 10% 7% 3% 1% 2% (NC 14%)

#16 In-state Tourism Spending:
 0%/ 10%/ 20%/ 30-40%/ 50%/ 75%/ 100%/
 4% 15% 28% 28% 10% 1% (NC 12%)

#17 Pay for Grp Tour Mktg list?:
 \$0/ \$1-25/ \$26-50/\$51-100/ - \$250/ - \$500/- \$1000/> \$1001/
 8% 19% 22% 25% 10% 5% (NC 10%)

The Regional System:
 ** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#18 Am familiar w/Reg'nal system
 StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
 18% 41% 18% 8% 6% 2% (NC 8%)

#19 Know their region?:
 Knows/ Unsure/
 64% 35% (NC 1%)

#20 Region Off valuable support!
 StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
 7% 28% 29% 15% 8% 7% (NC 6%)

#21 More coop adv support?:
 Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
 19% 18% 15% 11% 6% 10% (NC 21%)

#22 More funding opportunities?:
 Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
 19% 11% 14% 13% 7% 15% (NC 21%)

#23 More technical support?:
 Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
 11% 6% 8% 17% 19% 15% (NC 24%)

#24 More Regional advertising?:

Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
 17% 18% 22% 7% 8% 6% (NC 22%)

#25 More educatnal opportunity?:
 Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
 5% 10% 8% 15% 21% 19% (NC 23%)

#26 More inquiry generation?:
 Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
 21% 13% 10% 13% 10% 13% (NC 19%)

Welcome Centers:
 ** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#27 Welcome Centers # used:
 None/ One/ 2 - 4/ 5 - 8/ 9 - 12/13 - 18/
 15% 8% 14% 13% 17% 32% (NC 2%)

#28 Welcome Centers real assets!
 StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
 21% 35% 25% 3% 1% 9% (NC 6%)

#29 Am willing to pay Ctr fees!:
 StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
 2% 8% 10% 18% 17% 24% (NC 21%)

#30 Fees - how much per Ctr?:
 \$ 0/ \$ 10/ \$ 15/ \$ 20/ \$ 25/Gtr \$25/
 40% 10% 1% 1% 3% 2% (NC 41%)

Publications:
 ** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#31 Visitor's Guide very valuabl
 StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
 15% 31% 32% 7% 3% 9% (NC 3%)

#32 Add Outdoor Rec brochure?:
 Rank 1/ Rank 2/ Rank 3/
 28% 8% 10% (NC 54%)

#33 Add Arts/Culture brochure?:
 Rank 1/ Rank 2/ Rank 3/
 13% 7% 8% (NC 73%)

#34 Add Scenic Byway brochure?:
 Rank 1/ Rank 2/ Rank 3/
 15% 13% 18% (NC 55%)

#35 Add Historic Att brochure?:
 Rank 1/ Rank 2/ Rank 3/
 38% 21% 11% (NC 31%)

#36 Add Bed/breakfast brochure?:
 Rank 1/ Rank 2/ Rank 3/
 10% 3% 5% (NC 81%)

#37 Add Winter Activity brochure
 Rank 1/ Rank 2/ Rank 3/
 3% 6% 8% (NC 83%)

#38 Add Lodging brochure?:
Rank 1/ Rank 2/ Rank 3/
4% 4% 2% (NC 90%)

#39 Add Restaurant info brochure
Rank 1/ Rank 2/ Rank 3/
9% 3% 4% (NC 83%)

#40 Add Antiques Info brochure?:
Rank 1/ Rank 2/ Rank 3/
5% 15% 13% (NC 68%)

Promotional Efforts:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#41 Been to State Tourism conf:
Attend/NoAttnd/
47% 53%

#42 Been to Mini-conferences:
Attend/NoAttnd/
60% 40%

#43 Been to Travel show:
Attend/NoAttnd/
41% 59%

#44 Been to Ldrshp certificat'n:
Attend/NoAttnd/
26% 74%

#45 Been to TEAM/CEPP:
Attend/NoAttnd/
17% 83%

#46 Been to Regional meeting:
Attend/NoAttnd/
47% 53%

#47 Been StateFair Tourism Bldg:
Attend/NoAttnd/
57% 43%

#48 Expand scenic byways:
Impact/
61% (NC 39%)

#49 Expand international:
Impact/
22% (NC 78%)

#50 Expand Corps Lakes:
Impact/
29% (NC 71%)

#51 Expand casinos:
Impact/
8% (NC 92%)

#52 Expand riverboats:
Impact/
10% (NC 90%)

#53 Expand historic attractions:
Impact/
77% (NC 23%)

#54 Expand Group Travel:
Impact/
75% (NC 25%)

#55 Expand golf:
Impact/
14% (NC 86%)

#56 Expand agricultural pgms:
Impact/
35% (NC 65%)

#57 Expand Arts & culture:
Impact/
38% (NC 63%)

#58 Expand Multi-use trails:
Impact/
28% (NC 72%)

#59 Expand sightseeing:
Impact/
66% (NC 34%)

Location and Co-op Media:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#60 Region where located:
West Rg/Cnt Rgn/East Rg/
24% 35% 41%

#61 Coop ads- Radio Iowa?:
Used/
17% (NC 83%)

#62 Coop ads-Vacation Value Dir?
Used/
29% (NC 71%)

#63 Coop ads - News insert?:
Used/
40% (NC 60%)

#64 Number of Events Attended:
Attnd 1/Attnd 2/Attnd 3/Attnd 4/Attnd 5/Attnd 6/ At All/
29% 24% 15% 8% 9% 10% 5%

[End of report]

Tourism 1999 Task Force, State of Iowa - June 1993
Private Sector Questionnaire

Survey Item Analysis

C. S. Everett

Subset Questions

- # 41 Been to State Tourism conf
- # 42 Been to Mini-conferences
- # 43 Been to Travel show
- # 44 Been to Ldrshp certificat'n
- # 45 Been to TEAM/CEPP
- # 46 Been to Regional meeting
- # 47 Been StateFair Tourism Bldg

... and Responses:

- 2 NoAttnd and
- 2 NoAttnd and
- 2 NoAttnd and
- 2 NoAttnd and
- 2 NoAttnd and
- 2 NoAttnd and
- 2 NoAttnd

93 OF 237 = 39 %

<--- Responses in % ---> (No Comment %)

About the Facility or Event:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

1 Nature of facility/event:

Unowned/ Owned/Attrctn/Att&evt/
16% 4% 59% 17% (NC 3%)

2 Tax status(profit/non-prof):

Profit/NonProf/
43% 54% (NC 3%)

3 Age of facility/event:

0-1 yr/2-4 yrs/5-10 yr/> 11 yr/
4% 13% 26% 54% (NC 3%)

4 Annual visitation:

0-500/ - 1000/ - 2500/ - 5000/- 10000/- 25000/- 50000/-100000/>100000/
17% 5% 17% 12% 13% 11% 10% 4% 5% (NC 5%)

5 Seasons of operation:

Winter/ Spring/ Summer/ Fall/Spr&Smr/Sp&S&Fl/Sum&Fal/Fl &Wtr/ All Yr/
1% 4% 25% 1% 3% 18% 3% 1% 43%

6 Months of operation:

0-1/ 2-3/ 4-5/ 6-7/ 8-9/ 10-11/ 12/
19% 1% 4% 26% 2% 1% 45% (NC 1%)

7 Paid staff size:

None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
39% 14% 11% 6% 15% 9% 3% (NC 3%)

8 Volunteer staff size:

None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
32% 4% 10% 9% 10% 10% 9% 6% 10% (NC 1%)

9 Best Mo.-Tour Conf (Jan-Jun):

Jan/ Feb/ March/ April/ May/ June/
23% 11% 14% 10% 5% 4% (NC 33%)

#10 Best Mo.-Tour Conf (Jul-Dec):

July/ August/ Sept/ Oct/ Nov/ Dec/
8% 3% 11% 1% (NC 77%)

Advertising and Promotion:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#11 Total Budget (Mktg/Promtn):

\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$9000/- \$20000/- \$50000/>\$50000/
8% 20% 10% 14% 20% 14% 5% 3% 1% (NC 4%)

#12 Advertising budget:

\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$9000/- \$20000/- \$50000/>\$50000/
13% 24% 12% 12% 20% 10% 1% 1% 1% (NC 6%)

#13 Coop ads - used at all?:

Notused/ Used/
61% 39%

#14 Most effective coop media:

Newsppr/Televsn/ Radio/Magzine/DirMail/ Other/
45% 5% 3% 11% 13% 6% (NC 16%)

#15 How much coop ad spending?:

\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$6000/- \$10000/>\$10001/
30% 39% 8% 3% 1% 1% (NC 18%)

#16 In-state Tourism Spending:

0%/ 10%/ 20%/ 30-40%/ 50%/ 75%/ 100%/
2% 5% 14% 24% 29% 3% 1% (NC 22%)

#17 Pay for Grp Tour Mktg list?:

\$0/ \$1-25/ \$26-50/\$51-100/ - \$250/ - \$500/- \$1000/> \$1001/
28% 28% 13% 10% 8% (NC 14%)

The Regional System:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#18 Am familiar w/Reg'nal system

StrAgree/ Agree/Neutral/Disagre/StrDisa/Not App/
2% 17% 31% 17% 11% 11% (NC 11%)

#19 Know their region?:

Knows/ Unsure/
20% 80%

#20 Region Off valuable support!

StrAgree/ Agree/Neutral/Disagre/StrDisa/Not App/
9% 25% 17% 15% 16% (NC 18%)

#21 More coop adv support?:

Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
16% 14% 5% 5% 5% 8% (NC 46%)

#22 More funding opportunities?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
24% 5% 5% 5% 5% 9% (NC 46%)

#23 More technical support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
4% 3% 15% 8% 10% 8% (NC 53%)

#24 More Regional advertising?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
18% 11% 8% 9% 8% 3% (NC 44%)

#25 More educatnal opportunity?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
4% 6% 4% 4% 14% 13% (NC 54%)

#26 More inquiry generation?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
22% 6% 10% 12% 3% 4% (NC 43%)

Welcome Centers:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#27 Welcome Centers # used:
None/ One/ 2 - 4/ 5 - 8/ 9 - 12/13 - 18/
30% 11% 15% 11% 8% 17% (NC 9%)

#28 Welcome Centers real assets!
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
12% 28% 14% 6% 3% 16% (NC 20%)

#29 Am willing to pay Ctr fees!:
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
4% 9% 12% 14% 13% 23% (NC 26%)

#30 Fees - how much per Ctr?:
\$ 0/ \$ 10/ \$ 15/ \$ 20/ \$ 25/Gtr \$25/
33% 13% 3% 2% 2% 1% (NC 45%)

Publications:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#31 Visitor's Guide very valuabl
3trAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
9% 23% 25% 8% 9% 15% (NC 13%)

#32 Add Outdoor Rec brochure?:
Rank 1/ Rank 2/ Rank 3/
24% 5% 8% (NC 63%)

#33 Add Arts/Culture brochure?:
Rank 1/ Rank 2/ Rank 3/
11% 3% 14% (NC 72%)

#34 Add Scenic Byway brochure?:
Rank 1/ Rank 2/ Rank 3/
13% 22% 8% (NC 58%)

#35 Add Historic Att brochure?:
Rank 1/ Rank 2/ Rank 3/
44% 16% 11% (NC 29%)

#36 Add Bed/breakfast brochure?:
Rank 1/ Rank 2/ Rank 3/
14% 2% 5% (NC 78%)

#37 Add Winter Activity brochure
Rank 1/ Rank 2/ Rank 3/
2% 3% 6% (NC 88%)

#38 Add Lodging brochure?:
Rank 1/ Rank 2/ Rank 3/
5% 2% 3% (NC 89%)

#39 Add Restaurant info brochure
Rank 1/ Rank 2/ Rank 3/
2% 9% 5% (NC 84%)

#40 Add Antiques Info brochure?:
Rank 1/ Rank 2/ Rank 3/
11% 11% 10% (NC 69%)

Promotional Efforts:

** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#41 Been to State Tourism conf:
Attend/NoAttnd/
100%

#42 Been to Mini-conferences:
Attend/NoAttnd/
100%

#43 Been to Travel show:
Attend/NoAttnd/
100%

#44 Been to Ldrshp certificat'n:
Attend/NoAttnd/
100%

#45 Been to TEAM/CEPP:
Attend/NoAttnd/
100%

#46 Been to Regional meeting:
Attend/NoAttnd/
100%

#47 Been StateFair Tourism Bldg:
Attend/NoAttnd/
100%

#48 Expand scenic byways:
Impact/
53% (NC 47%)

Tourism 1999 Task Force, State of Iowa - June 1993
Private Sector Questionnaire

Survey Item Analysis C. S. Everett

Subset Questions ... and Responses:
60 Region where located 1 West Rgn

67 OF 237 = 28 %
<--- Responses in % ---> (No Comment %)

About the Facility or Event:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

1 Nature of facility/event:
Unowned/ Owned/Attrctn/Att&evt/
7% 70% 21% (NC 1%)

2 Tax status(profit/non-prof):
Profit/NonProf/
49% 49% (NC 1%)

3 Age of facility/event:
0-1 yr/2-4 yrs/5-10 yr/> 11 yr/
6% 13% 31% 46% (NC 3%)

4 Annual visitation:
0-500/ - 1000/ - 2500/ - 5000/ - 10000/ - 25000/ - 50000/ -100000/>100000/
13% 13% 10% 9% 9% 13% 7% 7% 12% (NC 4%)

5 Seasons of operation:
Winter/ Spring/ Summer/ Fall/Spr&Smr/Sp&S&Fl/Sum&Fal/Fl &Wtr/ All Yr/
1% 1% 13% 31% 1% 1% 49%

6 Months of operation:
0-1/ 2-3/ 4-5/ 6-7/ 8-9/ 10-11/ 12/
9% 3% 7% 15% 10% 4% 51%

7 Paid staff size:
None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
28% 13% 9% 13% 21% 7% 1% 1% 4%

8 Volunteer staff size:
None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
33% 15% 7% 12% 13% 9% 4% 6%

9 Best Mo.-Tour Conf(Jan-Jun):
Jan/ Feb/ March/ April/ May/ June/
12% 16% 10% 6% 3% 9% (NC 43%)

#10 Best Mo.-Tour Conf(Jul-Dec):
July/ August/ Sept/ Oct/ Nov/ Dec/
3% 7% 4% 16% 9% (NC 60%)

Advertising and Promotion:
* - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *
#11 Total Budget (Mktg/Promtn):
\$0/ - \$250/ - \$500/ - \$1000/ - \$3000/ - \$9000/ - \$20000/ - \$50000/ > \$50000/

1% 16% 7% 19% 25% 13% 6% 3% 3% (NC 4%)
#12 Advertising budget:
\$0/ - \$250/ - \$500/ - \$1000/ - \$3000/ - \$9000/ - \$20000/ - \$50000/ > \$50000/
3% 22% 9% 18% 21% 12% 4% 4% (NC 6%)

#13 Coop ads - used at all?:
Notused/ Used/
40% 60%

#14 Most effective coop media:
Newsppr/Televisn/ Radio/Magazine/DirMail/ Other/
40% 3% 7% 13% 10% 9% (NC 16%)

#15 How much coop ad spending?:
\$0/ - \$250/ - \$500/ - \$1000/ - \$3000/ - \$6000/ - \$10000/ > \$10001/
16% 49% 12% 3% 3% 3% (NC 13%)

#16 In-state Tourism Spending:
0%/ 10%/ 20%/ 30-40%/ 50%/ 75%/ 100%/
4% 13% 30% 28% 9% (NC 15%)

#17 Pay for Grp Tour Mktg list?:
\$0/ \$1-25/ \$26-50/\$51-100/ - \$250/ - \$500/ - \$1000/ > \$1001/
10% 25% 22% 27% 6% (NC 9%)

The Regional System:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#18 Am familiar w/Reg'nal system
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
12% 25% 30% 21% 3% (NC 9%)

#19 Know their region?:
Knows/ Unsure/
43% 57%

#20 Region Off valuable support!
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
10% 21% 19% 25% 4% 12% (NC 7%)

#21 More coop adv support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
22% 19% 9% 7% 3% 13% (NC 25%)

#22 More funding opportunities?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
22% 9% 10% 6% 6% 18% (NC 28%)

#23 More technical support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
13% 6% 10% 15% 15% 10% (NC 30%)

#24 More Regional advertising?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
19% 19% 18% 4% 12% 3% (NC 24%)

#25 More educatnal opportunity?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
3% 6% 9% 12% 21% 18% (NC 31%)

#26 More inquiry generation?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
13% 10% 13% 21% 10% 4% (NC 27%)

Welcome Centers:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#27 Welcome Centers # used:
None/ One/ 2 - 4/ 5 - 8/ 9 - 12/13 - 18/
21% 9% 10% 9% 13% 30% (NC 7%)

#28 Welcome Centers real assets!
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
21% 43% 10% 4% 13% (NC 7%)

#29 Am willing to pay Ctr fees!:
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
12% 13% 24% 12% 19% (NC 19%)

#30 Fees - how much per Ctr?:
\$ 0/ \$ 10/ \$ 15/ \$ 20/ \$ 25/Gtr \$25/
46% 13% 1% 1% 1% (NC 36%)

Publications:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#31 Visitor's Guide very valuabl
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
13% 28% 31% 9% 4% 9% (NC 4%)

#32 Add Outdoor Rec brochure?:
Rank 1/ Rank 2/ Rank 3/
25% 6% 4% (NC 64%)

#33 Add Arts/Culture brochure?:
Rank 1/ Rank 2/ Rank 3/
10% 6% 10% (NC 73%)

#34 Add Scenic Byway brochure?:
Rank 1/ Rank 2/ Rank 3/
16% 12% 12% (NC 60%)

#35 Add Historic Att brochure?:
Rank 1/ Rank 2/ Rank 3/
49% 13% 6% (NC 31%)

#36 Add Bed/breakfast brochure?:
Rank 1/ Rank 2/ Rank 3/
16% 3% 3% (NC 78%)

#37 Add Winter Activity brochure
Rank 1/ Rank 2/ Rank 3/
1% 4% 7% (NC 87%)

#38 Add Lodging brochure?:
Rank 1/ Rank 2/ Rank 3/
4% 3% 3% (NC 90%)

#39 Add Restaurant info brochure

Rank 1/ Rank 2/ Rank 3/
4% 7% 6% (NC 82%)

#40 Add Antiques Info brochure?:
Rank 1/ Rank 2/ Rank 3/
9% 16% 18% (NC 57%)

Promotional Efforts:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#41 Been to State Tourism conf:
Attend/NoAttnd/
21% 79%

#42 Been to Mini-conferences:
Attend/NoAttnd/
31% 69%

#43 Been to Travel show:
Attend/NoAttnd/
27% 73%

#44 Been to Ldrshp certificat'n:
Attend/NoAttnd/
15% 85%

#45 Been to TEAM/CEPP:
Attend/NoAttnd/
15% 85%

#46 Been to Regional meeting:
Attend/NoAttnd/
25% 75%

#47 Been StateFair Tourism Bldg:
Attend/NoAttnd/
25% 75%

#48 Expand scenic byways:
Impact/
60% (NC 40%)

#49 Expand international:
Impact/
19% (NC 81%)

#50 Expand Corps Lakes:
Impact/
27% (NC 73%)

#51 Expand casinos:
Impact/
9% (NC 91%)

#52 Expand riverboats:
Impact/
3% (NC 97%)

#53 Expand historic attractions:
Impact/

[End of report]

Rank 1/ Rank 2/ Rank 3/
9% 4% 4% (NC 83%)

#40 Add Antiques Info brochure?:
Rank 1/ Rank 2/ Rank 3/
4% 12% 8% (NC 77%)

Promotional Efforts:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#41 Been to State Tourism conf:
Attend/NoAttnd/
25% 75%

#42 Been to Mini-conferences:
Attend/NoAttnd/
38% 62%

#43 Been to Travel show:
Attend/NoAttnd/
26% 74%

#44 Been to Ldrshp certificat'n:
Attend/NoAttnd/
12% 88%

#45 Been to TEAM/CEPP:
Attend/NoAttnd/
12% 88%

#46 Been to Regional meeting:
Attend/NoAttnd/
23% 77%

#47 Been StateFair Tourism Bldg:
Attend/NoAttnd/
45% 55%

#48 Expand scenic byways:
Impact/
55% (NC 45%)

#49 Expand international:
Impact/
19% (NC 81%)

#50 Expand Corps Lakes:
Impact/
27% (NC 73%)

#51 Expand casinos:
Impact/
5% (NC 95%)

#52 Expand riverboats:
Impact/
6% (NC 94%)

#53 Expand historic attractions:
Impact/

77% (NC 23%)

#54 Expand Group Travel:
Impact/
66% (NC 34%)

#55 Expand golf:
Impact/
13% (NC 87%)

#56 Expand agricultural pgms:
Impact/
25% (NC 75%)

#57 Expand Arts & culture:
Impact/
45% (NC 55%)

#58 Expand Multi-use trails:
Impact/
26% (NC 74%)

#59 Expand sightseeing:
Impact/
60% (NC 40%)

Location and Co-op Media:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#60 Region where located:
West Rg/Cnt Rgn/East Rg/
100%

#61 Coop ads- Radio Iowa?:
Used/
17% (NC 83%)

#62 Coop ads-Vacation Value Dir?
Used/
18% (NC 82%)

#63 Coop ads - News insert?:
Used/
32% (NC 68%)

#64 Number of Events Attended:
attnd 1/Attnd 2/Attnd 3/Attnd 4/Attnd 5/Attnd 6/ At All/
14% 25% 9% 9% 3% 5% 1% (NC 34%)

[End of report]

Tourism 1999 Task Force, State of Iowa - June 1993
Private Sector Questionnaire

Survey Item Analysis C. S. Everett

Subset Questions ... and Responses:
60 Region where located 3 East Rgn

92 OF 237 = 39 %
<--- Responses in % ---> (No Comment %)

About the Facility or Event:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **
1 Nature of facility/event:
Unowned/ Owned/Attrctn/Att&evt/
16% 2% 57% 21% (NC 4%)
2 Tax status (profit/non-prof):
Profit/NonProf/
39% 57% (NC 4%)
3 Age of facility/event:
0-1 yr/2-4 yrs/5-10 yr/> 11 yr/
3% 12% 28% 54% (NC 2%)
4 Annual visitation:
0-500/ - 1000/ - 2500/ - 5000/ - 10000/ - 25000/ - 50000/ - 100000/ > 100000/
11% 5% 13% 14% 7% 11% 13% 12% 7% (NC 8%)
5 Seasons of operation:
Winter/ Spring/ Summer/ Fall/Spr&Smr/Sp&S&Fl/Sum&Fal/Fl &Wtr/ All Yr/
2% 18% 2% 3% 20% 3% 51%
6 Months of operation:
0-1/ 2-3/ 4-5/ 6-7/ 8-9/ 10-11/ 12/
15% 1% 3% 21% 5% 1% 50% (NC 3%)
7 Paid staff size:
None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
26% 15% 15% 11% 12% 10% 4% 3% 1% (NC 2%)
8 Volunteer staff size:
None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
33% 2% 9% 5% 10% 14% 9% 4% 12% (NC 2%)
9 Best Mo.-Tour Conf (Jan-Jun):
Jan/ Feb/ March/ April/ May/ June/
17% 15% 13% 13% 2% 4% (NC 35%)
#10 Best Mo.-Tour Conf (Jul-Dec):
July/ August/ Sept/ Oct/ Nov/ Dec/
1% 7% 3% 13% 10% 1% (NC 65%)

Advertising and Promotion:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **
#11 Total Budget (Mktg/Promtn):
\$0/ - \$250/ - \$500/ - \$1000/ - \$3000/ - \$9000/ - \$20000/ - \$50000/ > \$50000/
Page 1 of 5 (Private Sector - East Region)

4% 12% 7% 13% 20% 21% 9% 7% 5% (NC 3%)
#12 Advertising budget:
\$0/ - \$250/ - \$500/ - \$1000/ - \$3000/ - \$9000/ - \$20000/ - \$50000/ > \$50000/
7% 14% 13% 14% 22% 10% 5% 7% 3% (NC 5%)
#13 Coop ads - used at all?:
Notused/ Used/
53% 47%
#14 Most effective coop media:
Newsprr/Televisn/ Radio/Magzine/DirMail/ Other/
37% 3% 8% 21% 12% 4% (NC 15%)
#15 How much coop ad spending?:
\$0/ - \$250/ - \$500/ - \$1000/ - \$3000/ - \$6000/ - \$10000/ > \$10001/
20% 30% 16% 8% 4% 2% 1% 2% (NC 16%)
#16 In-state Tourism Spending:
0%/ 10%/ 20%/ 30-40%/ 50%/ 75%/ 100%/
2% 4% 23% 26% 25% 5% 2% (NC 12%)
#17 Pay for Grp Tour Mktg list?:
\$0/ \$1-25/ \$26-50/\$51-100/ - \$250/ - \$500/ - \$1000/ > \$1001/
22% 18% 13% 20% 12% 4% (NC 11%)

The Regional System:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **
#18 Am familiar w/Reg'nal system
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
11% 33% 18% 7% 13% 9% (NC 10%)
#19 Know their region?:
Knows/ Unsure/
50% 50%
#20 Region Off valuable support!
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
2% 18% 29% 13% 15% 12% (NC 10%)
#21 More coop adv support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
15% 18% 12% 10% 4% 9% (NC 32%)
#22 More funding opportunities?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
17% 10% 14% 14% 7% 10% (NC 28%)
#23 More technical support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
7% 4% 9% 9% 23% 15% (NC 34%)
#24 More Regional advertising?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
17% 13% 17% 11% 5% 7% (NC 29%)
#25 More educatnal opportunity?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
3% 12% 5% 14% 13% 17% (NC 35%)

#26 More inquiry generation?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
27% 10% 9% 8% 11% 10% (NC 26%)

Welcome Centers:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#27 Welcome Centers # used:
None/ One/ 2 - 4/ 5 - 8/ 9 - 12/13 - 18/
23% 11% 15% 12% 11% 24% (NC 4%)

#28 Welcome Centers real assets!
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
14% 32% 25% 4% 1% 13% (NC 11%)

#29 Am willing to pay Ctr fees!:
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
2% 9% 10% 18% 15% 24% (NC 22%)

#30 Fees - how much per Ctr?:
\$ 0/ \$ 10/ \$ 15/ \$ 20/ \$ 25/Gtr \$25/
38% 10% 2% 2% 4% 3% (NC 40%)

Publications:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#31 Visitor's Guide very valuabl
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
13% 25% 30% 9% 5% 9% (NC 9%)

#32 Add Outdoor Rec brochure?:
Rank 1/ Rank 2/ Rank 3/
28% 10% 10% (NC 52%)

#33 Add Arts/Culture brochure?:
Rank 1/ Rank 2/ Rank 3/
13% 2% 10% (NC 75%)

#34 Add Scenic Byway brochure?:
Rank 1/ Rank 2/ Rank 3/
12% 18% 21% (NC 49%)

#35 Add Historic Att brochure?:
Rank 1/ Rank 2/ Rank 3/
34% 26% 11% (NC 29%)

#36 Add Bed/breakfast brochure?:
Rank 1/ Rank 2/ Rank 3/
11% 3% 9% (NC 77%)

#37 Add Winter Activity brochure
Rank 1/ Rank 2/ Rank 3/
4% 7% 10% (NC 79%)

#38 Add Lodging brochure?:
Rank 1/ Rank 2/ Rank 3/
3% 3% 2% (NC 91%)

#39 Add Restaurant info brochure

Rank 1/ Rank 2/ Rank 3/
5% 5% 4% (NC 85%)

#40 Add Antiques Info brochure?:
Rank 1/ Rank 2/ Rank 3/
9% 12% 10% (NC 70%)

Promotional Efforts:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#41 Been to State Tourism conf:
Attend/NoAttnd/
37% 63%

#42 Been to Mini-conferences:
Attend/NoAttnd/
39% 61%

#43 Been to Travel show:
Attend/NoAttnd/
23% 77%

#44 Been to Ldrshp certificat'n:
Attend/NoAttnd/
20% 80%

#45 Been to TEAM/CEPP:
Attend/NoAttnd/
7% 93%

#46 Been to Regional meeting:
Attend/NoAttnd/
35% 65%

#47 Been StateFair Tourism Bldg:
Attend/NoAttnd/
33% 67%

#48 Expand scenic byways:
Impact/
60% (NC 40%)

#49 Expand international:
Impact/
22% (NC 78%)

#50 Expand Corps Lakes:
Impact/
27% (NC 73%)

#51 Expand casinos:
Impact/
10% (NC 90%)

#52 Expand riverboats:
Impact/
20% (NC 80%)

#53 Expand historic attractions:
Impact/

[End of report]

subset Questions ... and Responses:

53 OF 53 = 100 % <--- Responses in % ---> (No Comment %)

1 : 8% 17% 8% 9% (NC100%)

| # | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 | 39 | 40 | 41 | 42 | 43 | 44 | 45 | 46 | 47 | 48 | 49 | 50 | 51 | 52 | 53 | 54 | 55 | 56 | 57 | 58 | 59 | 60 | 61 | 62 | 63 | 64 | 65 | 66 | 67 | 68 | 69 | 70 | 71 | 72 | 73 | 74 | 75 | 76 | 77 | 78 | 79 | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 | 89 | 90 | 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99 | 100 |
|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|-----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 | 39 | 40 | 41 | 42 | 43 | 44 | 45 | 46 | 47 | 48 | 49 | 50 | 51 | 52 | 53 | 54 | 55 | 56 | 57 | 58 | 59 | 60 | 61 | 62 | 63 | 64 | 65 | 66 | 67 | 68 | 69 | 70 | 71 | 72 | 73 | 74 | 75 | 76 | 77 | 78 | 79 | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 | 89 | 90 | 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99 | 100 |

(NC100%)

| # 4 Age of organization: | | | | |
|--------------------------|----------|----------|----------|---------|
| 0-1 yr/ | 2-4 yrs/ | 5-10 yr/ | > 11 yr/ | |
| 2% | 11% | 19% | 66% | (NC 2%) |

5 Annual visitation:
 <25000/ -50000/-100000/-250000/-500000/-1 Mill/>1 Mill/
 30% 19% 9% 15% 6% 4% 9% (NC 8%)

| # 6 Paid staff size: | | | | | | | | | |
|----------------------|------|---------|----|---------|----------|----------|----------|---------|--------|
| None/ | One/ | 2 or 3/ | 4 | 5 to 6/ | 7 to 15/ | 16 - 30/ | 31 - 60/ | 61-120/ | > 121/ |
| 15% | 38% | 28% | 0% | 6% | 2% | 2% | | | 2% |

7 Volunteer staff size:

| None/ | One/ | 2 or 3/ | 4 to 6/ | 7 to 15/ | 16 - 30/ | 31 - 60/ | 61-120/ | > 121/ |
|-------|------|---------|---------|----------|----------|----------|---------|--------|
| 0% | 0% | 0% | 0% | 21% | 6% | 0% | 15% | 22% |

| # | 8 | Best Mo.-Tour Conf (Jan-Jun): | | | | | |
|---|---|-------------------------------|------|--------|--------|------|-------|
| | | Jan/ | Feb/ | March/ | April/ | May/ | June/ |
| | | 20 | 20 | 170 | 20 | 20 | 20 |

| # | 9 | Best Mo.-Tour Conf (Jul-Dec): | | | | | |
|---|---|-------------------------------|---------|-------|------|------|------|
| | | July/ | August/ | Sept/ | Oct/ | Nov/ | Dec/ |
| | | | | | | | |

#10 Total Budget (Mktg/Promtn):

| | | | | | | | | |
|------|----------|-----------|----------|----------|----------|-----------|----------|--------------|
| \$0/ | - \$250/ | - \$500/- | \$1000/- | \$3000/- | \$9000/- | \$20000/- | \$50000/ | >\$50000/ |
| 2% | 11% | 11% | 15% | 11% | 6% | 6% | 11% | 15% (NC 11%) |

| #11 Advertising budget: | \$0/ | - \$250/ | - \$500/- | \$1000/- | \$3000/- | \$9000/- | \$20000/- | \$50000/ | >\$50000/ |
|-------------------------|------|----------|-----------|----------|----------|----------|-----------|----------|-----------|
| | 21% | 17% | 11% | 6% | 13% | 15% | 4% | 1% | 0% |

#12 Coop ads - used at all?:
Notused/ Used/
43% 57%

#13 Coop ads- Radio Iowa?:
Used/
13% (NC 87%)

#14 Coop ads-Vacation Value Dir?
Used/
25% (NC 75%)

#15 Coop ads - News insert?:
Used/
34% (NC 66%)

#16 Coop ads- other media?:
Used/
4% (NC 96%)

#17 Most effective coop media:
Newsprr/Televisn/ Radio/Magzine/DirMail/ Other/
53% 6% 4% 17% 11% (NC 9%)

#18 How much coop ad spending?:
\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$6000/- \$10000/>\$10001/
21% 26% 9% 6% 17% 6% 2% (NC 13%)

#19 In-state Tourism Spending:
0%/ 10%/ 20%/ 30-40%/ 50%/ 75%/ 100%/
4% 26% 43% 19% 4% (NC 4%)

#20 Pay for Grp Tour Mktg list?:
\$0/ \$1-25/ \$26-50/\$51-100/ - \$250/ - \$500/- \$1000/> \$1001/
21% 8% 21% 15% 19% 2% 2% (NC 13%)

The Regional System:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#21 Am familiar w/Reg'nal system
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
25% 28% 25% 13% 2% 2% (NC 6%)

#22 Know their region?:
Knows/ Unsure/
66% 34%

#23 Region Off valuable support!
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
15% 26% 30% 13% 6% 4% (NC 6%)

#24 More coop adv support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
17% 19% 15% 6% 9% 17% (NC 17%)

#25 More funding opportunities?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
25% 11% 13% 13% 13% 9% (NC 15%)

#26 More technical support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
11% 11% 9% 13% 15% 19% (NC 21%)

#27 More Regional advertising?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
23% 21% 9% 11% 9% 13% (NC 13%)

#28 More educatnal opportunity?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
11% 8% 13% 17% 23% 9% (NC 19%)

#29 More inquiry generation?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
28% 8% 17% 17% 8% 9% (NC 13%)

Welcome Centers:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#30 Welcome Centers # used:
None/ One/ 2-4/ 5-8/ 9-12/ 13-18/
13% 9% 13% 17% 19% 23% (NC 6%)

#31 Welcome Centers real assets!
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
21% 38% 17% 4% 11% (NC 9%)

Publications:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - **

#32 Visitor's Guide very valuabl
StrAgree/ Agree/Neutral/Disagree/StrDisa/Not App/
11% 45% 25% 9% 8% (NC 2%)

#33 Add Outdoor Rec brochure?:
Rank 1/ Rank 2/ Rank 3/
32% 15% 11% (NC 42%)

#34 Add Arts/Culture brochure?:
Rank 1/ Rank 2/ Rank 3/
17% 8% 8% (NC 68%)

#35 Add Scenic Byway brochure?:
Rank 1/ Rank 2/ Rank 3/
26% 21% 4% (NC 49%)

#36 Add Historic Att brochure?:
Rank 1/ Rank 2/ Rank 3/
34% 13% 21% (NC 32%)

#37 Add Bed/breakfast brochure?:
Rank 1/ Rank 2/ Rank 3/
4% 2% 6% (NC 89%)

#38 Add Winter Activity brochure
Rank 1/ Rank 2/ Rank 3/
9% 8% 11% (NC 72%)

#39 Add Lodging brochure?:
Rank 1/ Rank 2/ Rank 3/
2% 6% (NC 92%)

#40 Add Restaurant info brochure
Rank 1/ Rank 2/ Rank 3/
2% 2% (NC 96%)

#41 Add Antiques Info brochure?:
Rank 1/ Rank 2/ Rank 3/
17% 9% 9% (NC 64%)

Promotional Efforts:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#42 Been to State Tourism conf:
Attend/NoAttnd/
49% 51%

#43 Been to Mini-conferences:
Attend/NoAttnd/
64% 36%

#44 Been to Travel show:
Attend/NoAttnd/
42% 58%

#45 Been to Ldrshp certificat'n:
Attend/NoAttnd/
19% 81%

#46 Been to TEAM/CEPP:
Attend/NoAttnd/
30% 70%

#47 Been to Regional meeting:
Attend/NoAttnd/
47% 53%

#48 Been StateFair Tourism Bldg:
Attend/NoAttnd/
45% 55%

#49 Expand scenic byways:
Impact/
51% (NC 49%)

#50 Expand international:
Impact/
28% (NC 72%)

#51 Expand Corps Lakes:
Impact/
25% (NC 75%)

#52 Expand casinos:
Impact/
8% (NC 92%)

#53 Expand riverboats:
Impact/
11% (NC 89%)

#54 Expand historic attractions:
Impact/
77% (NC 23%)

#55 Expand Group Travel:
Impact/
70% (NC 30%)

#56 Expand golf:
Impact/
19% (NC 81%)

#57 Expand agricultural pgms:
Impact/
62% (NC 38%)

#58 Expand Arts & culture:
Impact/
40% (NC 60%)

#59 Expand Multi-use trails:
Impact/
34% (NC 66%)

#60 Expand sightseeing:
Impact/
38% (NC 62%)

Location:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#61 Region where located:
West Rg/Cnt Rgn/East Rg/
32% 34% 34%

[End of Report]

Survey Item Analysis C. S. Everett

Subset Questions ... and Responses:

32 OF 32 = 100 % <--- Responses in % ---> (No Comment %)

About the Organization:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

1 Nature of organization:
Prof/PersDev/Soc&Env/ Bus./ Gov't/ Other/
6% 6% 22% 13% 22% 28% (NC 3%)

2 Interest/emphasis A:
Agric/ Arts/ Educ/Wldlife/ BusDev/ Histry/
3% 3% 6% 6% 16% 9% (NC 56%)

3 Interest/emphasis B:
Resourc/ Plng/ RecAct/ Sport/ Toursm/ Other/
9% 3% 6% 3% 38% 13% (NC 28%)

4 Age of organization:
0-1 yr/2-4 yrs/5-10 yr/> 11 yr/
6% 22% 22% 50%

5 Membership:
- 25/ - 50/ - 100/ - 200/ - 400/ - 800/ - 1500/ - 3000/ > 3000/
41% 19% 9% 6% 6% 3% 9% (NC 6%)

6 Paid staff size:
None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
31% 16% 16% 6% 9% 6% 3% 6% (NC 6%)

7 Volunteer staff size:
None/ One/ 2 or 3/ 4 to 6/7 to 15/16 - 30/31 - 60/ 61-120/ > 121/
6% 6% 3% 3% 25% 16% 9% 16% (NC 16%)

8 Best Mo.-Tour Conf(Jan-Jun):
Jan/ Feb/ March/ April/ May/ June/
3% 28% 6% 3% 6% 3% (NC 50%)

9 Best Mo.-Tour Conf(Jul-Dec):
July/ August/ Sept/ Oct/ Nov/ Dec/
3% 3% 9% 22% 6% (NC 56%)

Advertising and Promotion:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#10 Total Budget (Mktg/Promtn):
\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$9000/- \$20000/- \$50000/>\$50000/
6% 16% 13% 16% 19% 13% 6% 6% (NC 6%)

#11 Advertising budget:
\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$9000/- \$20000/- \$50000/>\$50000/
13% 16% 16% 22% 6% 6% 6% (NC 16%)

#12 Coop ads - used at all?:
Notused/ Used/
56% 44%

#13 Coop ads- Radio Iowa?:
Used/
13% (NC 88%)

#14 Coop ads-Vacation Value Dir?
Used/
13% (NC 88%)

#15 Coop ads - News insert?:
Used/
13% (NC 88%)

#16 Coop ads- other media?:
Used/
3% (NC 97%)

#17 Most effective coop media:
Newsppr/Televisn/ Radio/Magzine/DirMail/ Other/
38% 3% 3% 13% 13% 9% (NC 22%)

#18 How much coop ad spending?:
\$0/ - \$250/ - \$500/- \$1000/- \$3000/- \$6000/- \$10000/>\$10001/
16% 44% 9% 6% (NC 25%)

#19 In-state Tourism Spending:
0%/ 10%/ 20%/ 30-40%/ 50%/ 75%/ 100%/
3% 3% 38% 31% 9% (NC 16%)

#20 Pay for Grp Tour Mktg list?:
\$0/ \$1-25/ \$26-50/\$51-100/ - \$250/ - \$500/- \$1000/> \$1001/
19% 25% 19% 13% 3% 6% (NC 16%)

The Regional System:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#21 Am familiar w/Reg'nal system
StrAgree/ Agree/Neutral/Disagre/StrDisa/Not App/
22% 44% 16% 3% 6% (NC 9%)

#22 Know their region?:
Knows/ Unsure/
75% 22% (NC 3%)

#23 Region Off valuable support!
StrAgree/ Agree/Neutral/Disagre/StrDisa/Not App/
22% 47% 22% 6% 3%

#24 More coop adv support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
9% 6% 9% 16% 22% 9% (NC 28%)

#25 More funding opportunities?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
25% 16% 13% 9% 3% 13% (NC 22%)

#26 More technical support?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
19% 6% 16% 6% 13% 16% (NC 25%)

#27 More Regional advertising?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
6% 28% 13% 16% 9% 3% (NC 25%)

#28 More educatnal opportunity?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
6% 13% 9% 19% 16% 13% (NC 25%)

#29 More inquiry generation?:
Rank 1/ Rank 2/ Rank 3/ Rank 4/ Rank 5/ Rank 6/
16% 6% 16% 9% 13% 19% (NC 22%)

Welcome Centers:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#30 Welcome Centers # used:
None/ One/ 2-4/ 5-8/ 9-12/ 13-18/
22% 19% 3% 16% 31% (NC 9%)

#31 Welcome Centers real assets!
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
22% 31% 13% 3% 22% (NC 9%)

Publications:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#32 Visitor's Guide very valuabl
StrAgre/ Agree/Neutral/Disagre/StrDisa/Not App/
19% 28% 28% 3% 16% (NC 6%)

#33 Add Outdoor Rec brochure?:
Rank 1/ Rank 2/ Rank 3/
28% 19% 6% (NC 47%)

#34 Add Arts/Culture brochure?:
Rank 1/ Rank 2/ Rank 3/
6% 3% (NC 91%)

#35 Add Scenic Byway brochure?:
Rank 1/ Rank 2/ Rank 3/
19% 19% 19% (NC 44%)

#36 Add Historic Att brochure?:
Rank 1/ Rank 2/ Rank 3/
25% 13% 22% (NC 41%)

#37 Add Bed/breakfast brochure?:
Rank 1/ Rank 2/ Rank 3/
3% 16% (NC 81%)

#38 Add Winter Activity brochure
Rank 1/ Rank 2/ Rank 3/
6% 6% 6% (NC 81%)

#39 Add Lodging brochure?:
Rank 1/ Rank 2/ Rank 3/
3% 6% (NC 91%)

#40 Add Restaurant info brochure
Rank 1/ Rank 2/ Rank 3/
3% 9% 3% (NC 84%)

#41 Add Antiques Info brochure?:
Rank 1/ Rank 2/ Rank 3/
16% 6% 13% (NC 66%)

Promotional Efforts:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#42 Been to State Tourism conf:
Attend/
41% (NC 59%)

#43 Been to Mini-conferences:
Attend/
56% (NC 44%)

#44 Been to Travel show:
Attend/
22% (NC 78%)

#45 Been to Ldrshp certificat'n:
Attend/
41% (NC 59%)

#46 Been to TEAM/CEPP:
Attend/
38% (NC 63%)

#47 Been to Regional meeting:
Attend/
53% (NC 47%)

#48 Been StateFair Tourism Bldg:
Attend/
47% (NC 53%)

#49 Expand scenic byways:
Impact/
69% (NC 31%)

#50 Expand international:
Impact/
28% (NC 72%)

#51 Expand Corps Lakes:
Impact/
41% (NC 59%)

#52 Expand casinos:
Impact/
6% (NC 94%)

#53 Expand riverboats:
Impact/
3% (NC 97%)

#54 Expand historic attractions:
Impact/
78% (NC 22%)

#55 Expand Group Travel:
Impact/
66% (NC 34%)

#56 Expand golf:
Impact/
6% (NC 94%)

#57 Expand agricultural pgms:
Impact/
44% (NC 56%)

#58 Expand Arts & culture:
Impact/
28% (NC 72%)

#59 Expand Multi-use trails:
Impact/
50% (NC 50%)

#60 Expand sightseeing:
Impact/
47% (NC 53%)

Location:
** - * - * - * - * - * - * - * - * - * - * - * - * - * - * - * - *

#61 Region where located:
West Rg/Cnt Rgn/East Rg/
75% 16% 3% (NC 6%)

[End of Report]

TOURISM 1999 RECOMMENDATIONS

| | Avg | |
|-----|------|--|
| 1. | 1.38 | Develop a long-term consistent source of funding for marketing the Iowa tourism industry. |
| 2. | 1.45 | Make outdoor recreation a priority in the promotion of Iowa tourism. |
| 3. | 1.75 | Establish an Interagency Tourism Marketing Review Committee to strive to improve coordination between agencies. Especially those agencies that receive requests for various tourism information. |
| 4. | 1.88 | Funding for remodeling/upgrading of interstate Welcome Centers should be provided by the Iowa General Assembly. |
| 5. | 1.88 | Develop a state-wide public relations plan. |
| 6. | 2.00 | Give a high priority to historical attractions through existing and new materials. |
| 7. | 2.00 | Support the continued close cooperation of state agencies concerned with heritage tourism (DED, DCA, DNR, DOT). |
| 8. | 2.00 | Operational hours at interstate Welcome Centers should be expanded to eventually be year-round. |
| 9. | 2.13 | Top priority should be given to signs that most benefit travelers and the tourism industry. |
| 10. | 2.13 | Develop an Iowa state heritage tourism plan/program. |
| 11. | 2.13 | The IDOT trails study should be updated and adopted by IDOT and incorporated into the IDOT 5-year plan. |
| 12. | 2.13 | Support close cooperation between states tourism programs. |
| 13. | 2.13 | Emphasize Iowa's natural beauty and attractions in tourism promotion. |
| 14. | 2.13 | Create a publications review committee comprised of public information coordinators (DED, DOT, DNR, DCA) which meet regularly to share information on tourism-related publications. |

Avg

15. 2.25 Develop a plan that will allow interstate Welcome Centers to operate year round.
16. 2.25 Improve communications between the Regions and state; and between the Regions and counties and attractions, etc.
17. 2.38 Continue the alliance with the Iowa Group Travel Association.
18. 2.50 Develop a comprehensive statewide trails publication.
19. 2.50 Support the proposed Des Moines Register trails maps so to increase the print number from 20,000 to 50,000+.
20. 2.50 Continue to use agriculture as the theme of international group marketing.
21. 2.50 Information on scenic byways should be developed and published, in coordination with other outdoor activities, by the IDED.
22. 2.50 The IDOT trails inventory booklet should be completed as quickly as possible.
23. 2.50 Encourage development of creative ways to promote tourism and culture.
24. 2.63 Support long-term, secure sources of funding for development and care of outdoor recreation infrastructure.
25. 2.63 Explore the possibility of using electronic technology to disseminate tourism information.
26. 2.63 The state Trails Council and the Iowa Natural Heritage Foundation should coordinate trail guide efforts.
27. 2.63 IDOT should establish a "Trails Advocacy Group" prior to 1994 that will meet the requirements of the Symms legislation.
28. 2.63 Iowa should declare a state "Trails Week" that will include the National Trails Days.
29. 2.75 Maintain scenic integrity in all tourism services provided travelers.

Avg

30. 2.75 Develop a consistent familiarization tour schedule.
31. 2.75 Develop a formula for operational funding opportunities for locally owned welcome centers.
32. 2.75 Support funding of the Historic Resources Development Project program at \$1 million per year.
33. 2.75 Eliminate duplication of efforts in state marketing plan verses Regions' plans.
34. 2.75 Support funding of the Iowa Community Cultural Grant program at the \$1 million per year level <1987 RTL Recommendations>.
35. 2.75 Recognize the tourism industry as the marketing opportunity for culture and arts in Iowa.
36. 2.75 Test market a new publication, presenting attraction information in a different format, such as smaller travel regions or driving routes.
37. 2.88 A return insert card should be included within the general tourism packet (IDED) that allows consumers to order specific additional information, i.e. golf, bicycling, hiking, etc.
38. 2.88 Publish a comprehensive listing of Iowa's lodging facilities, including hotels/motels, inns, and bed and breakfasts.
39. 2.88 Develop multi-state and regional linkages and public/private relationships among providers to facilitate cross-promotion and quality experiences for visitors.
40. 2.88 Allow each Region flexibility within contracted activities so that programs may be tailored to specific needs.
41. 2.88 Include scenic byways routes, signed by local governments, and state designated routes, in tourism publications.
42. 2.88 Identify cultural organizations as tourism organizations and vice versa.
43. 2.88 Trails of all kinds should be included and identified on all future IDOT highway maps.

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| 44. | 2.88 | Increase the number of group travel marketplaces attended by the state and encourage private sector/supplier attendance. |
| 45. | 2.88 | Visitor count requirements should be relaxed so that signage benefits the traveler and the tourism industry (signage). |
| 46. | 3.00 | Develop a plan that coordinates state conferences of related groups so that they are held in the same area at the same time. |
| 47. | 3.00 | Establish more conservative criteria for inclusion in the Visitors Guide. |
| 48. | 3.00 | Conduct educational sessions each year on the visual appearance of community entrances. |
| 49. | 3.00 | Develop a comprehensive state of Iowa lodging guide and distribute it with every request for information. |
| 50. | 3.00 | Focus domestic group marketing efforts on developing new markets and customers. |
| 51. | 3.00 | Focus domestic group marketing efforts on developing new markets and customers. |
| 52. | 3.13 | Support funding of a statewide scenic byways plan by the Iowa General Assembly. |
| 53. | 3.13 | Integrate high quality cultural experiences into tourism events and attractions. |
| 54. | 3.13 | Study and re-evaluate the criteria used for promoting historic attractions. |
| 55. | 3.13 | Each sign should be reviewed periodically to ensure it is still meeting the original intent of its justification and placement. |
| 56. | 3.13 | Publish a comprehensive listing of Iowa's public and private campgrounds. |
| 57. | 3.13 | Continue to target Canada and Japan as primary international markets. |

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| 58. | 3.25 | Sponsor annual tourism community meetings. |
| 59. | 3.38 | The limitations on the number of signs at anyone location should be reviewed by the state/federal DOTs. |
| 60. | 3.38 | Support tree planting and wildflower vegetation programs established by IDOT. |
| 61. | 3.38 | Highlight visitor safety and excellent transportation access as important features of outdoor recreation. |
| 62. | 3.38 | Expand international marketing efforts into selected countries in Europe, South America, and into Australia. |
| 63. | 3.50 | DOT visitor count requirements should be uniformly enforced (signage). |
| 64. | 3.50 | Create a totally new Iowa Group Tour Manual. |
| 65. | 3.63 | Promote community-based support for outdoor recreation projects. |
| 66. | 3.63 | Include the Calendar of Events in all packets mailed out of state. |
| 67. | 3.63 | Annual educational sessions on signage should be provided throughout the state. |
| 68. | 3.75 | Bring together all midwestern states to develop a regional strategy for the development and marketing of trails. |
| 69. | 3.75 | Promote increased education and training to cultural tourism opportunities. |
| 70. | 4.00 | Develop a targeted mailing campaign to potential trail users from "free" mailing list sources such as hunting licenses, canoe registrations, etc. |
| 71. | 4.00 | Reduce state funding to Regions to enable more direction by membership. |
| 72. | 4.00 | Establish an international tourism marketing committee. |

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- 73. 4.13 The tourism industry should lobby against year-round school legislation.
- 74. 4.25 Limit state government's role as a primary provider of services that duplicate or undermine the private sector.
- 75. 4.38 Support the allocation of hotel/motel taxes to heritage tourism.
- 76. 4.50 Develop a licensing program that provides certification requirements for visitors centers located in communities that are locally owned and operated.
- 77. 4.50 A targeted mailing for trail users be explored by IDED.
- 78. 4.50 An information piece be developed for cross-country skiing enthusiasts.
- 79. 4.50 Raise the wagering limits in Iowa gaming legislation.
- 80. 4.63 New signage logos should be developed for use by the Iowa Welcome Centers and Bed and Breakfasts.

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